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ABSTRACT

This final report describes the PEERS (Providing Education for Everyone in Regular Schools) Project, a 5-year collaborative systems change project in California to facilitate the integration of students with severe disabilities who were previously served at special centers into services at regular schools and the integration of students in special classes in regular schools into general education. The project resulted in more than 3,000 students with severe disabilities making the transition from special centers to age-appropriate regular school sites and/or general education classrooms. Other project outcomes included: (1) development and dissemination of 17 products; (2) training and technical assistance to a total of 450 local education agencies (LEAs); and (3) revision of pupil count and compliance review procedures to obtain better integration data. Sixteen appendices include the following items, among others: the PEERS Integration/Inclusion Needs Assessment; a sample LEA plan; PEERS implementation site criteria for inclusive programs; the PEERS consultant bank; and preservice course syllabi. Appendices also include the following papers or articles: "Effective Practices for Inclusive Programs: A Technical Assistance Planning Guide" (M. Simon et al.); "Systems Change: A Review of Effective Practices" (T. Karasoff et al.); "Curriculum Adaptation for Inclusive Classrooms" (T. Neary et al.); "PEERS Guidelines for Full Inclusion" (T. Neary et al.); "Parent Perceptions of Integration Transitions" (M. F. Hanline and A. T. Halvorsen); "Integration of Students with Severe and Profound Disabilities: A Review of Research" (A. Halvorsen and N. Sailor); and "The Elementary School Principal's Role in the Education of Students with Severe Disabilities" (G. Smith). (DB)

ED358633

STATEWIDE SYSTEMS CHANGE PROJECT FOR THE INTEGRATION OF SEVERELY DISABLED STUDENTS IN CALIFORNIA

THE PEERS PROJECT
PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

FINAL REPORT

Innovative Programs for Severely Handicapped Children
U.S. Dept. of Education
Office of Special Education and Rehabilitation
Grant number: G 0087C3058
CFDA: 84.086 J

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Patrick Campbell
Project Director

Steve Johnson
Administrator, Statewide Programs Unit

Ann Halvorsen, Ed.D.
Tom Neary, M.A.
Coordinators

California Department of Education
Special Education Division
721 Capitol Mall
P.O. Box 944272
Sacramento, CA. 94244-2720
916-657-3567

EC 302196

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Abstract

PEERS Project
Providing Education for Everyone in Regular Schools

A statewide systems change project for the integration of students with severe disabilities

Patrick Campbell
Director

Ann Halvorsen, Ed.D.
Regional Coordinator

Tom Neary
Regional Coordinator

Steve Johnson
Administrator

Suzanne Gilbert
Regional Coordinator

Susann Terry-Gage
Project Consultant

The PEERS Project has been a five year collaborative systems change project through the California Department of Education in coordination with California State Universities at Hayward and Sacramento, designed to facilitate the integration of students with severe disabilities in California who had been attending special centers, and later, the inclusion of students into general education who had been attending special classes in regular schools. This project also assisted in the improvement of the integration of students already on regular school sites, and was instrumental in establishing full inclusion programs in participating educational agencies. Over the course of the project, more than 3000 students with severe disabilities made the transition from special centers to age-appropriate, regular school sites and/or general education classrooms. Implementation sites were developed in each participating Special Education Local Plan Area (SELPA) or LEA. Multiple related outcomes occurred: 1) Development and dissemination of 17 products including collaborative manuals with the California Research Institute, book chapters, journal articles, research instruments, a week-long inclusion institute training module, integration needs assessment process, implementation site listing; 2) training and technical assistance were provided to 200 non PEERS local education agencies, which, combined with 250 PEERS LEAS resulted in a total project effort with 450 of the state's 1040 LEAS. Sixty-three other state, regional and local organizations were also direct recipients of PEERS services, and information was disseminated through conferences, workshops newsletters and related media to approximately 181,000 individuals nationwide; 3) CDE pupil count and Coordinated Compliance Review procedures were revised to obtain accurate, meaningful data on integration, and 4) training, materials and technical assistance were provided to the CDE Special Education Division to ensure longevity of project efforts and continuity of support for statewide integration systems change.

Further information of project activities and outcomes may be obtained from:

Steven Johnson
Administrator
Statewide Programs Unit
CDE
P.O. Box 944272
Sacramento, CA 94244-2720
(610) 657-3256

Regional Coordinators

Ann Halvorsen, Ed.D.
PEERS II Outreach
Department of Educational Psychology
CSU Hayward
Hayward, CA 94542
(510) 881-3087

Tom Neary, M.A.
PEERS II Outreach
650 Howe Ave, Suite 300
Sacramento, CA 95825
(916) 641-5030

PEERS Project
Final Report

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C. PEERS Implementation Site Criteria for Inclusive Programs
D. School Site Team Collaboration for Inclusive Education: PEERS Training Institute
E. PEERS Consultant Bank
F. Simon, M., Karasoff, T., & Smith, A. (1992) Effective practices for inclusive programs: A technical assistance planning guide. San Francisco, CA: SFSU (with contributions by PEERS staff).
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H. Neary, T., Halvorsen, A., Kronberg, R & Kelly, D. (1992) Curriculum adaptation for inclusive classrooms. San Francisco, CA: SFSU, California Research Institute.
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J. Hanline, M.F. & Halvorsen, A.T. (1989). Parent Perceptions of Integration Transitions, Exceptional Children, 55.
K. Waiver request sample: Lassen COE SELPA.
L. Inclusive Education Implementation Sites Sample.
M. Inclusive Education Site Listing.
N. Halvorsen, A. & Sailor, N. (1990) Integration of students with severe and profound disabilities: A review of research. In R. Gaylord-Ross (Ed.) Issues and research in special education Vol 1. NY: Teachers College Pres.
O. Preservice course syllabi
CSU Sacramento
CSU Hayward

P. Smith, G. (1993) Principals ownership in inclusive and integrated settings. Hayward CA: CSU Hayward

LS: Lynn Smitney, SELPA Serv. Coord.
AH: Ann Halvorsen, Int. Trn. Coord.
TN: Tom Neary, Int. Curric. Spec.
PC: Patrick Campbell, Proj. Dir.
DC: Data Collector
EC: Eval. Consultant

Table 1
Project Objectives

Objectives	PSR	YEAR 01				YEAR 02				YEAR 03				YEAR 04				YEAR 05 SERVICE YEAR 05 4/91-9/92			
		0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12
Component 1: Provide Special Education Local Plan Area (SELPA) / LEA LRE Services																					
Objective 1: Facilitate transition of 10,000 sd students to integrated school sites		--	--	--	--							--	--	--	--	--	--	--	--	--	--
1.1 Finalize selection criteria and application process for SELPA/LEA participation and application process for SELPA/LEA participation	LS TN AH PC	—								---				—							
1.2 Disseminate criteria statewide	"	—								---				—							
1.3 Identify five SELPAs through application process	"	—	(2-6)					(2-6)	—					—	—						
1.4 Conduct needs assessment with targeted SELPAs	"	—	(3-6)					(3-6)		—	—				—	—	—				
1.4.1 Develop LRE Support Team in each SELPA	"	—	(3-6)					(3-6)		—	—				—	—	—	—	—	—	—

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LS: Lynn Sm'hey, SELPA Serv. Coord.
AH: Ann Hal 'sen, Int. Trn. Coord.
TN: Tom Neary, Int. Curric. Spec.
PC: Patrick Campbell, Proj. Dir.
DC: Data Collector
EC: Eval. Consultant

Objectives	PSR	YEAR 01	YEAR 02	YEAR 03	YEAR 04 SERVICE YEAR 05 4/91-9/92	YEAR 05
		0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
1.4.2 Develop LRE policy statement and objectives with Support Team (ST)	"	—— (3-6)	(3-6)	——	——	——
1.4.3 Develop action plan for LRE services (training, etc.)	"	—— (3-6)	(3-6)	——	——	——
1.5 Coordinate school site selection process with ST	"	—— (4-8)	(4-8)	——	——	——
1.5.1 Identify schools across age levels	"	—— (4-8)	(4-8)	——	——	——
1.5.2 Conduct on-site evaluations using specific criteria		—— (4-8)	(4-8)	——	——	——
1.5.3 Select preschool, elementary, middle, high school, and transition sites		—— (4-8)	(4-8)	——	——	——
1.5.4 Site representatives join LRE ST		—— (4-8)	(4-8)	——	——	——

LS: Lynn Smithey, [illegible] Serv. Coord.
AH: Ann Hal ien, Int. Trn. Coord.
TN: Tom Neary, Int. Curric. Spec.
PC: Patrick Campbell, Proj. Dir.
DC: Data Collector
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Objectives	PSR	YEAR 01	YEAR 02	YEAR 03	YEAR 04	YEAR 05 SERVICE YEAR 05 4/91-9/92
		0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
1.6 Provide inservice training as delineated in Training Action Plan	LS TN AH PC	—— (6-10)	(6-8)	——	——	——
1.6.1 Identify regional and school site teams across constituencies	"	—— (6-10)	—— (6-8)	——	——	——
1.6.2 Identify consultant needs in specialized areas	"	—— (6-10)	—— (6-8)	——	——	——
1.6.2.1 Contract with selected consultant for technical assistance/ training plan	"	—— (6-10)	(6-8)	——	——	——
1.6.3 Implement training series for regional and school site teams with ICSM and specified consultants	"	—— (6-10)	—— (6-8)	——	——	——
1.7 Identify within ST initial groups of students for	LS TN AH	—— (6-10)	[illegible] 10)	——	——	——

LS: Lynn Sm' 'cy, SELPA Serv. Coord.
AH: Ann Hal. sen, Int. Trn. Coord.
TN: Tom Neary, Int. Curric. Spec.
PC: Patrick Campbell, Proj. Dir.
DC: Data Collector
EC: Eval. Consultant

Objectives	PSR	YEAR 01 0-3 4-6 7-9 10-12	YEAR 02 0-3 4-6 7-9 10-12	YEAR 03 0-3 4-6 7-9 10-12	YEAR 04 0-3 4-6 7-9 10-12	YEAR 05 0-3 4-6 7-9 10-12
SERVICE YEAR 05 4/91-9/92						
1.7.1 Conduct planning and information meetings for parents	LS TN AH	——(6-10)	(6-10)	——	————	————
1.7.2 Develop/disseminate student survey forms for completion SELPA-wide		——(6-10)	(6-10)	——	————	——
1.7.3 Hold IEP review meetings and develop transfer plan		——(6-10)	(6-10)	——	——	——
1.7.4 SELPA/LEA forms heterogeneous groups of sd students for initial classes		——(6-10)	(6-10)	——	——	——
1.8 Transfer targeted students in each SELPA to integrated placements	"		[illegible] ——	(10-1) ———	————	————
1.8.1 Recruit/select teachers and paraprofessionals for transfers		10-12		——	——	————

[illegible]
AH: Ann Halvorsen, Int. Trn. Coord.
N: Tom Neary, Int. Curric. Spec.
C: Patrick Campbell, Proj. Dir.
C: Data Collector
C: Eval. Consultant

SERVICE YEAR 05 4/91-9/92

Objectives	PSR	YEAR 01				YEAR 02				YEAR 03				YEAR 04				YEAR 05			
		0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12
1.8.2 Develop individualized site implementation plans with school staff					10-12 —								—				—	—	—	—	
1.8.3 Site preparation/inservice training according to 1.8.2					10-12 —								—				—	—	—	—	
1.8.4 Arrange student transportation					10-12 —								—				—	—	—	—	
1.8.5 Transfer students and staff					—	(10-1)			—	(10-1)			—	—				—	—	—	—
1.9 Repeat 1.7-1.8 for additional sites in each SELPA/LEA					—	(10-1)			—	(10-1)			—	—	—		—	—	—	—	—
1.10 Conduct formative evaluation of integration implementation across sites		- -	- -	- -	- -							- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
1.10.1 CRI on-site review at four-month intervals		- -	- -													- -	- -	- -	- -	- -	- -

Project Staff Responsible (PSR) | Ongoing activity | Anticipated time of major focus: ___

S: Lynn Sm ey, SELPA Serv. Coord.
H: Ann Halw.,sen, Int. Trn. Coord.
N: Tom Neary, Int. Curric. Spec.
C: Patrick Campbell, Proj. Dir.
C: Data Collector
C: Eval. Consultant

Objectives	PSR	YEAR 01 0-3 4-6 7-9 10-12	YEAR 02 0-3 4-6 7-9 10-12	YEAR 03 0-3 4-6 7-9 10-12	YEAR 04 0-3 4-6 7-9 10-12	YEAR 05 0-3 4-6 7-9 10-12
					SERVICE YEAR 05 4/91-9/92	
1.10.2 Develop SELPA/LEA evaluation plan across sites		____(9-12)	_____(9-12)	________		____________
1.11 Develop criteria for and select model site(s) within each SELPA (see Component 2)		-- -- -- --	--	-- ···· -- --	-- -- -- --	-- -- -- --
1.12 Repeat 1.1--1.11 for each year of project with new SELPAs/LEAs		-- -- -- --	-- - - --	-- -- -- --	-- -- -- --	-- -- -- --
nponent 2: Develop atewide network of 25 del integrated sites ross geographic areas, mmunity types (rural/ ban/suburban) and ernance structures		-- -- -- --	-- -- --	-- -- -- --	-- -- -- --	-- -- -- --
jective						
2.1 Develop criteria for model site selection	LS TN AH	___(6-8)				
2.2 Submit criteria to SDE School Recognition Program and Project Advisory Board for review		__(8-9)				

LS: Lynn Sm ey, SELPA Serv. Coord.
AH: Ann Hal sen, Int. Trn. Coord.
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Objectives	PSR	YEAR 01	YEAR 02	YEAR 03	YEAR 04	YEAR 05 SERVICE YEAR 05 4/91-9/92
		0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
2.3 Finalize and disseminate criteria to participating SELPAs		___(9-12)				
2.4 Implement selection process			___(12-2)	___(12-2)	___(12-2)	___(12-2) ___ (11-12)
2.5 Conduct on-site reviews of finalists	LS TN AH		___(12-2)	___(12-2)	___(12-2)	___(12-2) ___ (11-12)
2.6 Select five sites per year from targeted SELPAs/LEAs			___(12-2)	___(12-2)	___(12-2)	___(12-2) ___ (11-12)
2.7 Provide ongoing, technical assistance to model sites as indicated by reviews			--	-- -- -- --	-- -- -- --	-- -- -- --
2.8 Utilize sites for training in Years 02-05	LS TN AH		--	-- -- -- --	-- -- -- --	-- -- -- --
2.8.1 Arrange for visitations from other SELPAs/LEAs on an ongoing basis			--	-- -- -- --	-- -- -- --	-- -- -- --
2.8.2 Structure on-site trainings to visiting				-- --	-- -- -- --	-- -- -- --

LS: Lynn S[illegible]hey, SELPA Serv. Coord.
AH: Ann Ha[illegible]rsen, Int. Trn. Coord.
TN: Tom Neary, Int. Curric. Spec.
PC: Patrick Campbell, Proj. Dir.
DC: Data Collector
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		YEAR 01				YEAR 02				YEAR 03				YEAR 04 SERVICE YEAR 05				YEAR 05 4/91-9/92			
Objectives	PSR	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12
2.8.3 Solicit site personnel participation in consultant bank, on project task forces, in dissemination activities							-	--	--	--	--	--	--	--	--	--	--	--	--	--	--
2.8.4 Conduct annual evaluation of model site integration effectiveness	and DC			___					___(7-10)			___(7-10)				___(7-10)				___(7-10)	
2.8.5 Coordinate model site network activities with California School Recognition Program						--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
Component 3: Develop and provide integration inservice series to internal State Department of Education (SDE) personnel																					
Objective 3.1 Adapt component 1 training series to meet SDE audience needs	TN LS AH	___(1-3)																			

LS: Lynn Sr hey, SELPA Serv. Coord.
AH: Ann Ha. rsen, Int. Trn. Coord.
TN: Tom Neary, Int. Curric. Spec.
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Objectives	PSR	YEAR 01 0-3 4-6 7-9 10-12	YEAR 02 0-3 4-6 7-9 10-12	YEAR 03 0-3 4-6 7-9 10-12	YEAR 04 SERVICE YEAR 05 0-3 4-6 7-9 10-12	YEAR 05 4/91-9/92 0-3 4-6 7-9 10-12
3.2 Pilot training series with ICSM Coordinator (sd area), trainers; and with SDE Deaf-Blind Program Director and staff		___(4-6)				
3.3 Collect effectiveness data		___(6-8)				
3.4 Incorporate training revisions		___(8-10)				
3.5 Provide inservice training to:		(10)__	- - - - - - -	- - - - - - -	- - - - - - -	- - -(6)
3.5.1 Forty SDE Special Education Field Consultants		___(10-12)				
3.5.2 CTRN Parent Specialists			(1-3)			
3.5.3 SDE Education and Transition Center (ETC) staff			__(4-7)			
3.5.4 SDE Preschool Unit			____(8-12)			
3.5.5 SDE Adult Education staff				___(1-3)		

LS: Lynn Sr[illegible]ey, SMPA Serv. Coord.
AH: Ann Halvorsen, Int. Trn. Coord.
TN: Tom Neary, Int. Curric. Spec.
PC: Patrick Campbell, Proj. Dir.
DC: Data Collector
EC: Eval. Consultant

Objectives	PSR	YEAR 01	YEAR 02	YEAR 03	YEAR 04	YEAR 05 SERVICE YEAR 05 4/91-9/92
		0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
3.5.6 Community Colleges Enabler Program (Disabled Student Services Coordination)				___(4-7)		
3.5.7 State LRE Task Force and Commission on Special Education			___(1-3)			
3.6 Identify and provide training to other key SDE audiences				-- -- --	-- -- -- --	-- -- -- -- --
3.7 Evaluate training effectiveness		-- -- --	-- -- --	-- -- -- --	-- -- -- --	-- -- -- --
3.8 Provide ongoing technical assistance to SDE personnel on request		-- -- --	-- -- --	-- -- -- --	-- -- -- --	-- -- -- --
Component 4: Collaborate with Institutes of Higher Education (IHE) preservice training programs						
Objective 4.1 Develop integration modules for incorporation within Administrative Credential mainstreaming	AH LS	___(2-6)				

LS: Lynn Smi ey, SELPA Serv. Coord.
AH: Ann Halv. sen, Int. Trn. Coord.
TN: Tom Neary, Int. Curric. Spec.
PC: Patrick Campbell, Proj. Dir.
DC: Data Collector
EC: Eval. Consultant

Objectives	PSR	YEAR 01	YEAR 02	YEAR 03	YEAR 04	YEAR 05 SERVICE YEAR 05 4/91-9/92
		0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
4.1.1 Field-test module at one IHE (Loyola-Marymount) in Year 01	LS	______(6-12)				
4.1.2 Revise modules as needed			__(12-2)			
4.1.3 Negotiate with three additional IHE Education Departments for inclusion in each subsequent year			__(12-2) ______(9-12)	___(9-12)	____(9-12)	____(9-12)
4.1.4 Continue dissemination of modules across all 19 CSU campuses and additional private university credentialling programs			-- -- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --
4.1.5 Collect annual student and faculty evaluation data and revise as indicated			__(12-2)	__(12-2)	___(12-2)	___(12-2)

LS: Lynn S[illegible]hey, SELPA Serv. Coord.
AH: Ann Halvorsen, Int. Trn. Coord.
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		YEAR 01	YEAR 02	YEAR 03	YEAR 04 SERVICE YEAR 05	YEAR 05 4/91-9/92
Objectives	PSR	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
4.2 Develop integration module for incorporation within regular education teacher credential mainstreaming requirements	AH	—	(12-2) —	(12-2) —	(12-2) —	(12-2)
4.2.1.5 Repeat 4.1 for teacher credential programs; pilot at San Francisco State University in Year 01		(same sequence as 4.1.1 - 4.1.5)				
4.3 Incorporate and utilize training materials and resources developed by the California Research Institute on Integration of Severely Disabled Students (CRI/SFSU)	AH	————				
4.4 Disseminate CRI-developed materials to IHEs and SELPAs/LEAs statewide	AH TN	————	————			

Ongoing activity

Anticipated time of major focus - ____

LS: Lynn Smit , SELPA Serv. Coord.
AH: Ann Halvorsen, Int. Trn. Coord.
TN: Tom Neary, Int. Curric. Spec.
PC: Patrick Campbell, Proj. Dir.
DC: Data Collector
EC: Eval. Consultant

SERVICE YEAR 05 4/91-9/92

		YEAR 01				YEAR 02				YEAR 03				YEAR 04				YEAR 05			
Objectives	PSR	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12
bjective 5.1 Establish SDE General/Special Education Intragency Task Force to address integration barriers, develop guidelines and procedures for LEAs in areas including:	PC LS AH TN	--	--	--	--	--		--	--	--	--	--	--	--	--	--	--	--	--	--	--
5.1.1 Core curriculum requirements and differential standards		--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
5.1.2 Graduation requirements		--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
5.1.3 Parallel administrative structures		--	--	--	--	--		--	--	--	--	--	--	--	--	--	--	--	--	--	--
5.1.4 Space allocations		--	--	--	--	--			--	--	--	--	--	--	--	--	--	--	--	--	--
5.1.5 Funding		--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
5.1.6 Preservice training (see Component 4)		--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
5.2 Establish statewide transdisciplinary Advisory	PC LS AH																				

(ongoing activity)

Project Staff Responsibility (PSR)
LS: Lynn Sm ey, SELPA Serv. Coord.
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SERVICE YEAR 05 4/91-9/92

Objectives	PSR	YEAR 01 0-3 4-6 7-9 10-12	YEAR 02 0-3 4-6 7-9 10-12	YEAR 03 0-3 4-6 7-9 10-12	YEAR 04 0-3 4-6 7-9 10-12	YEAR 05 0-3 4-6 7-9 10-12
4.5 Identify and solicit participation of key integration experts at IHEs statewide to serve on Advisory Board and task forces (see Component 5)	AH LS	——— (8-12)				
4.6 Identify key IHE personnel to serve as consultants within Regionalized Consultant Bank for SELPA LRE Services	AH TN	————	————————			
4.7 Coordinate project activities with the State Supported Employment Training Consortium, and its School-Age Services Committee, and State LRE Task Force	LS AH	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --

Component 5: Facilitate collaborative relationships between general and special education

LS: Lynn Sr ey, SELPA Serv. Coord.
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Objectives	PSR	YEAR 01	YEAR 02	YEAR 03	YEAR 04 SERVICE YEAR	YEAR 05 05 4/91-9/92
		0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
5.2.1 Notify committed members of award; arrange initial meeting	PC LS AH	___(1-3)				
5.2.2 Form task forces on identified needs:	"	___(2-6)				
5.2.2.1 Integrated related services	"	(6) - - -	- - - - - - - - -	- - - - - - - - -	- - - - - - - - - -	- - -(6)
5.2.2.2 Facilities use	"	(6) - - -	- - - - - - - - -	- - - - - - - - -	- - - - - - - - - -	- - -(6)
5.2.2.3 Transprolation	"	(6) - - -	- - - - - - - - -	- - - - - - - - -	- - - - - - - - - -	- - (6)
5.2.2.4 Transition age students	"	(6) - - -	- - - - - - - - -	- - - - - - - - -	- - - - - - - - - -	- - -(6)
5.2.3 Coordinate Board activities with State LRE Task Force	LS	(6) - - - -	- - - - - - - - -	- - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -
5.2.4 Facilitate necessary interagency agreements through task force vehicle	PC		———————	———————	———————	
5.2.5 Provide inservice training to Board on need sis	LS/AH	(6) - - -	- - -	- - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -

S: Lynn Smit , SELPA Serv. Coord.
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Objectives	PSR	YEAR 01	YEAR 02	YEAR 03	YEAR 04	YEAR 05 SERVICE YEAR 05 4/91-9/92
		0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
5.2.6 Utilize Board for product review and dissemination activity	LS/AH	____	____			
mponent 6: Establish rocedures to improve EHA rt B state plan on ild-find activities for l severely disabled (sd) ildren and youth		- - - - - -	- - - - - -	- - - - - -	- - - - - -	- - - - - -
jective						
6.1 Coordinate project activity with: State Interagency Task Force on Early Intervention and Infant-Preschool Planning Council	PC LS	____ (2-6)				
6.2 Participate in development of interagency agreements and procedures for implementation of PL 99-457 screening and child-find activities	AH TN	____ (3-6)				
6.3 Assist targeted SELPA/LEAs with 6.2 procedures.	DC	____ (6-12)	(6-12)	____ (6-12)	____ (6-12)	____ (6-12)

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		YEAR 01	YEAR 02	YEAR 03	YEAR 04	YEAR 05 SERVICE YEAR 05 4/91-9/92
Objectives	PSR	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
6.4 Track all newly identified sd children and youth in targeted SELPAs		______(6-12)	______(6-12)	______(6-12)	______(6-12)	______(6-12)
6.5 Assist with comprehensive child-count collection policies/procedures and monitoring	DC	-- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --
Component 7: Disseminate project activities, materials, resources	LS AH TN					
Objective 7.1 Disseminate on local level via SELPA LRE activities, interagency meetings, workshops at local/regional conferences	LS AH TN	(6) -- --	- -- --	-- -- -- --	-- -- -- --	-- -- -- --
7.2 Disseminate statewide through: inservice activities; conferences e.g. CAL-TASH, CAPED, ACSA; newsletters e.g. CAC for Special Education; presentation to		(10) --	-- -- --	-- -- -- --	-- -- -- --	-- -- -- --

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		YEAR 01	YEAR 02	YEAR 03	YEAR 04 SERVICE YEAR 05 4/91-9/92	YEAR 05
Objectives	PSR	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
Special Education Advisory Commission and State LRE Task Force						
7.3 Develop and disseminate project products		-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --
7.3.1 Develop slide presentation		___(3-6)	(2-4)			
7.3.2 Develop project brochure	AH LS TN	___(1-3)				
7.3.3 Present at national TASH, CEC and NASDE conferences annually and to system change SED projects in other states		-- --	-- -- -- -	-- -- -- --	-- -- -- --	-- -- -- --
7.3.4 Draft and submit two journal articles for publication			___(1-6)	______(6-10)		
7.4 Develop Integration Systems Change Handbook						
7.4.1 Outline of content				______(6-12)		

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SERVICE YEAR 05 4/91-9/92

Objectives	PSR	YEAR 01 0-3 4-6 7-9 10-12	YEAR 02 0-3 4-6 7-9 10-12	YEAR 03 0-3 4-6 7-9 10-12	YEAR 04 0-3 4-6 7-9 10-12	YEAR 05 0-3 4-6 7-9 10-12
7.4.2 Working draft					__(1-3)	
7.4.3 Disseminate draft for national review					__________(3-10)	
7.4.4 Complete final product					(10)____	______(8)
omponent 8: Evaluate roject implementation nd outcomes	PC LS AH TN DC	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --
bjective 8.1 Project Management by Objectives		-- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- --
8.1.1 Monthly staff review and action plan		-- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --
8.1.2 Advisory Board progress reviews		____	____	____	____	____
8.1.3 Quarterly reports to SDE		-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --
8.1.4 Ongoing communication with Project Officer		-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- --
8.1.5 Annual federal reports		__(9-10)	__(9-10)	__(9-10)	__(9-10)	__ (9-12)

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		YEAR 01				YEAR 02				YEAR 03				YEAR 04 SERVICE YEAR 05				YEAR 05 4/91-9/92			
Objectives	PSR	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12	0-3	4-6	7-9	10-12
8.2 Budget management by regional fiscal agent		--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
8.2.1 Subcontract management by regional fiscal agent		--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
8.2.2 Monthly manpower/expenditure reports to SDE		--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
8.2.3 SDE federal reporting		--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
8.3 Conduct formative evaluation activities		--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	
8.3.1 Documentation of number of sd student transfers to integrated programs					--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
8.3.2 Annual sd student count data across service delivery models					--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

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SERVICE YEAR 05 4/91-9/92

Objectives	PSR	YEAR 01 0-3 4-6 7-9 10-12	YEAR 02 0-3 4-6 7-9 10-12	YEAR 03 0-3 4-6 7-9 10-12	YEAR 04 0-3 4-6 7-9 10-12	YEAR 06 0-3 4-6 7-9 10-12
8.3.3 Annual count of pre-service/inservice training recipients by category/role	TN DC	__(11-12)	__(11-12)	__(11-12)	__(11-12)	__(11-12)
8.3.4 Aggregate inservice/pre-service consumer satisfaction and effectiveness data	TN AH DC	__(11-12)	__(11-12)	__(11-12)	__(11-12)	__(11-12)
8.3.5 Documentation of cooperative agreements with other agencies	LS AH TN DC	--	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --
8.3.6 Effectiveness of model integrated sites	"	--	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --
8.3.7 Quality of SELPA LRE Plan component			-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --
8.3.8 Parent satisfaction data		____(10-2)	____(10-2)	____(10-2)	____(10-2)	__(12)
8.4 Conduct summative evaluation activities	LS TN AH DC					

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SERVICE YEAR 05 4/91-9/92

Objectives	PSR	YEAR 01	YEAR 02	YEAR 03	YEAR 04	YEAR 05
		0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12	0-3 4-6 7-9 10-12
8.4.1 Implement Study #1: Opportunity for and amount of interaction	LS TN AH DC	————	————	————		
8.4.2 Implement Study #2: Changes in quality of interaction and program				————	————	————
8.4.3 Implement Study #3: Change in self-concept and attitudes of nondisabled students			————	————		
8.4.4 Implement Study #4: Principals' ownership across governance structures and student age					————	————
8.5 Conduct external evaluation of project activities		____(10-12)		___(10-12)		
8.5.1 Hire and consult with evaluator		_(6)		_(6)		
8.5.2 Incorporate plan revisions			_(11-1)		_(11-1)	

IV.
Project Goals and objectives

All objectives have been met or exceeded their targets according to proposed timelines.

V. Theoretical/Conceptual Framework for the PEERS Project:

A. Facilitating Locally Owned Change

* This section and VB are based on two chapters authored by Dr. Ann Halvorsen and included in the manual Systems change: A review of effective practices (Karasoff, T., Alwell, M. & Halvorsen, A., 1992), a joint CRI-PEERS Product.

Rationale:

True systems change to support the integration of students with severe disabilities within their home schools and communities is synonymous with local ownership of that change. The common understanding and operationalizing of this concept is clear across all of the funded systems change projects. Historically, from the societal change strategies of the 1960's War on Poverty to the current discussion of Enterprise Zones designed to effect meaningful change in inner city communities, the overriding theme has been the importance of indigenous leadership and direction for the design of change. This theme runs as well through the school reform literature, and is a critical component of school restructuring demonstrations as well as the American 2000 initiative. (Sailor, 1991, Smith, Hunter & Shrag, 1991).

It reflects good common sense. Clearly, for reform to occur, a district or school must have internal investment in that process, which must in turn reflect and define the district's local vision. In the absence of that local vision, plans often go awry. The exemplary efforts of a rural community to include and support all of their students within general education classes cannot simply be transplanted to an inner city district with its crumbling physical plants and near-bankrupt finances. The planning process may be quite similar, and the desired best practices as well as the outcomes for students in inclusive settings will have many of the same features, but the markers along the way need to reflect the distinct characteristics and the context of each community.

For this to occur, the key stakeholders in the local district must direct the process. While advocacy and litigation have served as catalysts for change across the United States, these in themselves tend to result in reform of mere pieces of system, such as a new integrated program in one school, or for one group of children, rather than of the system itself. Eventually, in this scenario, repeated advocacy efforts are needed to support student transitions, or the introduction of additional students to the program. As some point local ownership and planning are needed to move from an adversarial relationship between one group and the system, to lasting internal change.

Similarly, external change agents such as project personnel can facilitate, but not direct the change process. Only the key stakeholders have the required expertise and intimate knowledge of the school community to articulate the philosophy and mission. Superintendents and Board Members know, for example, whether policies exist which may inhibit or provide disincentives to integration as well as how rapidly the district is growing, where new schools are planned, etc. Principals and teachers need to assess their own knowledge base, support and inservice needs; parents are the best informed regarding their children's educational priorities. Facilities and transportation personnel have invaluable information to contribute to the change process. The list goes on, but the critical players will differ from community to community and reflect both the vision and the specific nature of each district's concerns.

A locally-driven effort allows for these expressions of concern, and provides the vehicle to address multiple issues throughout the change process. We can expect that individuals will come to the process with differing levels of concern, such as those described by the Concerns-Based Adoption Model (CBAM) (Hord, 1987). In this model, six stages of concern, from awareness ("What are you talking about?") to refocusing ("I can think of some ways we could improve on what we've developed so far") are described, with strategies to respond for each level. A process for hearing, analyzing, and addressing concerns is inherent to local ownership, and is discussed below.

Once a local vision for change is established an external facilitator such as a systems change coordinator, university consultant or model demonstration project can provide guidance and assistance toward realizing that vision.

Activities to facilitate locally owned change

Ownership Defined

What are the elements of local ownership? The essential features which we have observed are leadership, commitment at each level, participation and investment in the planning process, and the fit between inclusion and overall district reform/restructuring

Leadership

Five years ago, in the large urban district of Oakland, **California**, there were three categorically grouped segregated centers serving nearly 500 students with severe multiple disabilities from preschool through 22 years of age. Despite overtures by two local universities, critical state and federal compliance reviews and numerous mediations/ fair hearings on LRE issues, the district offered only a handful of integrated classes in its nearly 100 schools. An application was submitted to PEERS, (Providing Education for Everyone in Regular Schools) California's statewide systems change project for technical assistance in its first year, which coincided with the district's selection of a new Director of Special Education by the Superintendent. The Director accepted the offer with the Superintendent's assurances that change toward integration would be a priority. Within nine months, more than 300 students previously served in isolated centers were attending a range of integrated options in their local schools. Now four years later, the one remaining center has half of its classes used by general education students. There are over 45 integrated programs, many of which are inclusive in nature. Leadership was the first key to an opening for lasting change. This director's proactive leadership was characterized by several markers 1) a personal vision for integration grounded in an effective schools framework, 2) a commitment and sense of urgency to realize that vision, 3) an ability to listen and respond to any individual's concern, and to demonstrate her valuing of each concern, 4) demonstrated credibility with her peers and superiors in the district, and 5) her problem - solving orientation. One example: She was able to guide the district's instructional cabinet toward adopting a policy where special education students who are included for one or more periods a day "count" in the teacher's contractual class size, even though they do not "count" for general education ADA purposes under the state's funding model. The implications of this are clear: Once 30 students are included, a new general education teacher will be required. This Director was able to convince the cabinet to commit to and adopt the policy despite the LEA's financial constraints.

Commitment

Ownership needs commitment at both grass roots and upper administrative levels, as well as everything in between. This can be fostered by strong leadership at the superintendent, director or board level. For example, consider a recent case in a high growth suburban **California** district. Most students with moderate to severe disabilities had attended county-operated programs, the majority of which were situated outside the district until two events occurred during the same year: 1) an active parent was elected to the district's Board of Education and 2) the county placed a team-taught kindergarten, developed by a general and special educator, in one of the district's schools. The Board began to question the costs of the county program and to hear more about inclusive/integrated options from everyone involved with the kindergarten, at the same time as real grass roots support at the school level began to stimulate inclusion of those kindergartners in first grade and beyond. A year later, other students are being included in middle school; a team is working on short and long term plans to serve all the students who now attend county-operated programs; the Director is retiring and a new proactive replacement is being sought, and collaboration among these special education activities and district restructuring efforts is evident.

Participation in the planning process will also assist in developing investment in the goals of that process, and is discussed in detail below. However, all of us can recall instances where change agents have attempted to work around key players when those individuals were considered to be counterproductive to the process. We must emphasize that creative techniques for obtaining at minimum the representation of all constituencies is essential to the success of the process. A decade ago in one major urban district, systems change and LEA staff made a decision to "work around" a center principal, to basically ignore him during the change process. The problems engendered by this approach were several: a) people hadn't recognized his large base of support, and the subsequent backlash against integration efforts, b) a rumor mill became rampant, i.e., those left out of the process began making up their own stories about what was developing, and c) this constituency had less opportunity than anyone for their concerns to be heard. Perhaps as a direct result of this error, that center remained open with two or three classes for 8 years beyond the integration of 800 other students throughout the district.

Restructuring and reform

The Regular Education Initiative (REI) of recent years (Will, 1986; Wang, 1988) was problematic in that the impetus for the reform came primarily from within Special Education (Sailor, 1991). What the REI lacked, to some extent, was correspondence with the concurrent effective schools reform in general education.

New opportunities exist today for a truly shared agenda (Sailor, 1991, Sailor, Gee & Karasoff, 1993). The language of change in both general/and special education has become increasingly similar, as educators discuss instructional and curricular processes such as cooperative learning, and thematic activity-based instruction, and look to share resources by infusing programs into the whole, with inclusion of all students as a part of each school (Servatius, Fellows & Kelly, 1992; Schattman & Benay, 1992).

Inclusion and integration make the most sense to educators when they are seen as a part of the larger context, where all students benefit. It is incumbent on special educators to examine the fit between their goals and those of general education at state, district and local levels, and to move toward greater alignment of these, using many of the strategies outlined in this and upcoming sections of the manual.

Facilitator's Role

External change agents, such as systems change project personnel, can foster the development of leadership, commitment, stakeholder participation and alignment with restructuring elements if the initial stages of these exist, and as long as this "external authority" is not substituted for the expertise of local practitioners (Elmore & McLaughlin, 1988). Facilitators can do this through several activities. They may

1) Co-present with staff about integration to critical groups e.g. Boards of Education, Superintendents, Teachers Association, parent advocacy organizations, etc.
2) Provide resources and materials for internal use and training e.g. videotapes, articles, research reports, etc.
3) Share resources such as sample plans and best practice guidelines from similar districts.
4) Connect LEA with any local IHE resources for inservice training, and evaluation purposes.
5) Assist with initial needs assessment process to examine the status of existing integration/inclusion in the LEA by accompanying director others on district program visits, talking with staff, discussing needs informally becoming visible in the LEA.
6) Review LEA Strategic Plan and suggest to Superintendent/Director areas where special education plans could be more fully incorporated.
7) Brainstorm with Director and core steering committee how to develop a district wide integration planning group or "support team," which constituencies should be represented, how selection process will occur, charge and status of the group, as well as the governance approval process for recommendations and plans developed.

Participation of Key Constituencies

For all of the LEAS and SELPAS involved in California's PEERS systems change efforts, the involvement of stakeholders in the process was a standard element. As we discussed earlier, the climate for change is enhanced by the local contribution and investment that result from this participation.

Developing a Representative Group

How a district-wide task force or support team is formed will impact directly on its future effectiveness. Several questions can guide districts in this process:

1. Which organizations/ departments/ groups need to participate in the plan?

   This decision should be made by the Superintendent with the Director. The groups selected should reflect the nature of the community and probable local priorities or issues. For example, in Solano County, **California**, where the development of integrated preschool options was the top priority, the Integration Support Team reflected that direction. Invited participants included: parents, district/county office of education administrators and teachers, private preschool providers for typical students, federal/ state-funded preschool providers (Headstart, child development centers), the Early Childhood Education Department and lab school at the local community college, Recreation Department personnel, and so on. These were the people whose buy-in and contributions would be essential to the viability of future options.

2. How will representatives of these organizations be selected?

   This process will reflect both the status and intent of the effort. For example, if a letter comes from the Superintendent of the LEA to the organization/department requesting appointment of a representative, this implies top level district ownership and high status of the task force, and selection of the representative can be left to the group itself. However, if the participation of individuals with specific expertise or interest in integration is preferred, then a follow-up phone call by the Director could be made with suggestions of specific individuals. The role of the members (liaison, contributor, communicator) should also be delineated in these initial contacts.

3. How will the charge of the task force be communicated to them and throughout the LEA?

It is critical that participants understand the group's purpose from the outset. The initial Superintendent's letter should state this clearly, e.g. "to design and initiate implementation of quality integrated programming for all students". The LEA also needs to have a strategy for initial meetings where the local vision for integration will be articulated.

4. Where does the task force fit within the district hierarchy?

   The system for the revision, approval or adoption of the mission and plans developed needs to be in place and communicated to all stakeholders. Local governance structures will determine the process. In a single district, the hierarchy will be straightforward through the levels of the administration to the Board of Education. In multi-LEA consortia or intermediate units this process may be more complex - e.g. through a Directors' Steering Committee to a Superintendents' Council and a Joint Powers Board of Education. Whatever the process, its steps should be clear to all participants. Too often, teachers and implementors are not informed of their administrations approval process, and are left to wonder who created this policy or that program, or what happened to the outcome of their department's curriculum committee.

Integration Task Force Operation

The functions of the task force are multiple:

1) Developing the vision for change

2) Assessing the current status of integration district-wide in relation to the vision

3) Consensus building: Moving from mission and needs assessment to policy and goals

4) Collaboration across constituencies to develop an implementation plan which reflects all key areas

5) Interfacing with existing district and building level restructuring processes and

6) Assisting in implementation of the change process at site levels.

1. Developing the vision for change

It's critically important that districts define their vision for inclusion, e.g.: same age, home school, full-time regular education placement with support, and notes that the operational assumptions of this definition are a) that labels do not define placement and 2) that financial and program support must follow students into the general education classroom. Each district has its definition for integrated education, and a variety of strategies for moving in that direction, using PEERS guidelines as benchmarks.

Districts reported that the local vision resulted from a group consensus regarding the desired student outcomes of integrated programs. PEERS staff concentrated on building a common philosophical base in each school for inclusive education values. Strategies they employed included sharing videos and visiting programs where the vision is "being actualized". We utilized a variety of needs assessment survey data to negotiate district site agreements which reflected an outcomes-driven vision. In **California** we have found that the local group often needs to acquire a common information base about both best practices and the status of existing local programs before the vision can be fully articulated. For this reason, concurrent with needs assessment activities, task forces generally spent a third to half of each working meeting in self-education activities such as: having guest speakers or panels from inclusive programs in similar districts, viewing videotapes or slide presentations from other programs which reflect best practices, or hearing from members within the group about local curricular and instructional practices. This facilitates exchange and development of a shared information base that will enable participants to a) assess local needs and b) develop a consensual vision or direction.

2. Assessing the status of integration district-wide in relation to the vision

Multiple tools have been developed to guide this process. PEERS Integration/Inclusive Education Local Needs Assessment (Halvorsen, Smithey, Neary & Gilbert, rev. ed 1992) provides an instrument for assessing a) the existing district integration/inclusion plan, in terms of all areas from facilities and transportation to personnel, student preparation, related services and curriculum, as well as b) the current status of integrated programs district-wide in the absence of an existing plan. The assessment process is generally by committee, and can include interviews, program observations, and document review by task force members with interest/expertise in specific areas. Site or building level needs assessment in **California** is guided by the project's Implementation Site Criteria for Integrated Programs (Halvorsen, Neary & Smithey, 1991) and its adaptation for inclusive programs developed by PEERS with contributions fro CRI in 1992. (Halvorsen et al, 1992) Each of these tools provides a standard to guide district assessment.

3. Consensus building: Moving from mission and needs assessment to policy and goals

California has operated somewhat differently than many other states in this activity. Here, the district Integration Support Team or task force, which represents multiple sites, develops the mission and implementation plan, including specific goals, activities, timelines and resources required, across all of the critical areas, i.e. Facilities, Transportation, Related Services, Student, Personnel and Parent Preparation, Curriculum Development, Instructional Strategies, etc. This district level plan then moves in two directions: upward through the administrative approval process, and outward to individual school sites to guide their building level planning effort. In California, PEERS observed that the district level support and concrete plan of action was a necessary framework for school level buy-in.

The geographic and/or population size and diversity of many communities has been a driving force in the need for district level planning in **California**, as in many similarly impacted states, such as **Virginia** and **New York**. Critical changes in the transportation delivery system, strategies for block scheduling to provide related services in general education and community contexts, providing staff development in either extremely large sparsely or densely populated areas are all issues that require overall planning to ensure continuity of programming across sites and age levels. Whether at district or school site levels or both, the most exciting aspect of this process is its collaborative nature.

4. Collaboration Across Constituencies to Develop the Implementation Plan

While all educators and parents participate on teams, from student centered IEP teams to curriculum and schoolwide planning groups, until recently the vast majority of us received little or no training in how to work as a team member. The ability to collaborate in a nonheirarchical manner, with all contributors having equal status, and each having unique expertise and perspective to add to the process, is an acquired and essential skill. (cf Thousand & Villa, 1990). One early inservice needed in the district and school planning process is likely to be in collaborative teaming, utilizing cooperative learning structures not unlike those designed for our students to work together (Johnson & Johnson 1989; Thousand & Villa, 1989).

At the district level, a subgroup of the integration team planning for related services might include general and special education administrators, nursing staff, teachers, facilities and equipment personnel form the central office, parents, therapists and clinicians. A school level team would be equally diverse, and could point the direction toward changes in job descriptions, subsequent issues around "role release", or work schedule alterations. To make these challenging decisions and develop plans to support them requires true collaboration across these constituencies. The planning group itself is then providing a model for the implementation of integration systems change. (See Sample, Appendix B).

The district level plan which evolves from the collaborative efforts of the Integration/Inclusive Education Support Team will cover all essential areas with specific objectives and activities, including, e.g. student groupings and transitions, site selection/preparation, related service delivery, transportation, facilities and equipment, student, staff and parent "inservice" preparation, curriculum, and peer support systems. Perhaps the most important aspect of the district level plan is how it will be brought to the school site level for implementation, and in doing so, how these plans can interface with the local school reform or restructuring process.

5. Interfacing with LEA and building level restructuring efforts or the existing school planning process.

Sailor (1991), Skrtic, (1990) and many others have noted that special education is now in the best position ever to share in the restructuring agenda. For one thing, students and programs are located at home schools, often for the first time. Students, staff and parents are part of the school community, not visitors or people "renting space" in the building. The process for implementation of local plans needs to capitalize on this sense of community at the site level. A schoolwide collaborative process to adapt the plans to site-specific needs is required. In a wonderful example of this, Colusa High School in rural northern **California** put together a team which included everyone from Board members to students, and developed their mission, a needs assessment utilizing quality indicators from several sources, and an action plan for inclusion.

The district level integration "support team" or task force can serve as a valuable resource in the actualizing of plans at the school level. For example, members from specific schools can make presentations to their faculty, site councils and student study teams during the LEA planning process, to keep them apprised of events and solicit their input. These representatives can also arrange for site visits from school teams to demonstration programs within or outside the district, and include opportunities for communication with school level teams as a part of that visit. In **California**, members from the Integration Resource Team in San Lorenzo Valley Unified School District brought inclusive priorities to district strategic planning efforts, which has resulted in several outcomes, such as planned core curriculum infusion in the area of ability awareness education. In Napa, **California** district team members provided ability awareness education to inclusive schools when school teams had adopted this as a goal.

Restructuring initiatives in many states are on a parallel, concurrent timeline with integration systems change. The primary common feature across these initiatives is their site based orientation, with site based management, shared decision making, teacher empowerment, and active community participation in the life of the school. Special education inclusive efforts bring the infusion of categorical resources (Sailor, 1991) to the systemic restructuring process, enhancing that process and providing new opportunities for all staff and students. In **California** two state initiatives, SB 1274 (restructuring demonstrations) now in its second year, and SB 620 (coordinated service delivery) in its first year, provide competitive grants to school sites pursuing these objectives. Interestingly, despite the emphasis in RFPS on including all students in SB 1274 grants, only 25% of those funded discussed special education in their initial grants. **California's** state Department of Education has targeted those schools for additional training and technical assistance through the California Research Institute, in order to encourage and support schools which have recognized this need.

Professional Growth and District Recognition

Systems change efforts must note the importance of recognizing districts and schools that develop model programs, and PEERS provided opportunities for their continued growth.

1) In **California**, the State Department of Education and/or systems change projects have developed and provided support to a network of implementation or demonstration sites utilized for visitations,

hands-on training, peer-peer contacts (e.g. principal to principal, teacher to teacher) and ongoing professional growth through site networking meetings and annual individualized growth plans.

2) Statewide Newsletters - PEERS utilized Special edge, the statewide newsletter of the Department of Education, parent networks and the like to publicize and highlight model or demonstration program. These articles often focused on a specific student's story, and then move from the student/family point of view to a larger district perspective highlighting strengths of the program, student progress reports, and aspects of the local change process.

3) Co-presentations with personnel from demonstration programs at national conferences such as TASH, Statewide TASH chapters and annual general and special education statewide conferences, regional seminars, university-based academic, courses state sponsored leadership and innovation institutes, were also utilized.

4) Use of local media The "limelight" strategy has been employed effectively in many locations to recognize exemplary programs. In Davis, **California** the local paper's education editor was invited to attend planning/advocacy meetings and then visit the inclusive program on its very first day. This has led to a series of feature articles over a three year period, some of which have been picked up by neighboring city's media. This strategy not only provides well-earned recognition, but also serves as a prime education tool for the general public.

5) Specific awards to exemplary sites occur in many locations. **California** implementation site personnel receive stipends for visitations and observations in acknowledgement of the preparation time required.

6) Intra and Inter-district training PEERS and TRCCI exemplary site staff worked individually or as team members to provide training and technical assistance consultation to sites within and outside their districts, as well as providing or sponsoring building level inservices within their own schools. **California** also provided

trainer inservice to site personnel to enhance their effectiveness as trainers for these activities.

Evaluation

Districts can pose several questions to examine the efficacy of their activities to promote locally-owned change. Questions asked should reflect the local priorities, and might include:

1. Who participated in the change process?
   Were all key constituencies represented at LEA and building levels?
2. How satisfied were participants with the planning process?
3. Are the planning groups continuing to meet once implementation has begun, to monitor, problem-solve and evaluate the change process?
4. Does the plan have specific objectives, timelines and evaluation criteria for the implementation change?
5. How satisfied are consumers of the plans with their implementation? (parents, educators, students and administrators)
6. Has the training provided to various constituencies throughout the process addressed their needs?
   Are participants using that information in local implementation?
7. How effective is the collaborative teaming process?
   Do members feel their contributions are valuable and meaningful to the process?
8. How has integration systems change become infused within overall school reform?
   Is there documented evidence of this infusion?
   Are there plans to facilitate the infusion process if it is not yet in place?

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9. Have the policies and plans developed by district and school site teams been adopted by their respective governance structures, i.e. Boards of Education and School Site Councils?

V.B. Increasing Awareness and Knowledge of Best Practice

Rationale

As we mentioned above, knowledge and understanding of best practices for the education of students with severe disabilities are essential to developing a vision for change and plans for actualizing that vision (Servatius et al., 1992). While some representatives of the key stakeholders in a district may have that awareness level information, they may not have had opportunities to practice that knowledge or build their skills in best practices. This will be especially prevalent in districts where inclusive/integrated contexts have not been developed to date.

Constituencies that have had no prior exposure to these programmatic best practices, such as facilities and transportation personnel, as well as some general educators and paraprofessionals, may lack even awareness level information about the rationale for inclusive education, its research base, program operation, and expected or desired outcomes. Therefore, in order to plan together and implement effective integration, training is necessary to provide a common foundation.

In addition to awareness and skill building inservice education that is focused on best practices content, staff and families will often need training in collaborative team processes in order for a systemic workable plan to develop at LEA and building levels (Rainforth, York, & MacDonald, 1992; Vandercook & York, 1990). And finally, as plans are put into practice, a variety of constituencies will require new information and skills to implement best practices. As with every aspect of the change process, local needs and priorities must guide training. Training needs assessments are critical tools to determine student, parent, general and special education, related services staff, as well as administrative priorities for information and skills development. As this section illustrates, the Peers Project recognized the variability among communities and tailored its activities to meet the diversity by adapting training modules to target groups, developing local trainer cadres or peer coaching programs, and "matching" districts or school sites to similar communities for technical assistance, training and "mentoring".

Activities

We are all familiar with the distinctions between awareness and skill building strategies. These can be thought of as steps on a continuum, or as distinct entities based on a "need to know" premise. An obvious example would be Board of Education members who need awareness level information about why inclusive options are important, about who the students are, and the impact of integration on their educational outcomes and quality of life. They do not need to have the skills to implement inclusive education themselves. Teachers, in contrast, need both awareness information and hands-on skills.

Awareness Level

1) Use of Existing Vehicles and Conference Attendance

On the face of it, providing awareness level training may appear to be a simpler task than skill building, yet the sheer volume of awareness level needs is often daunting in itself. This underscores the importance of utilizing existing training vehicles to promote awareness. For example, Peers coordinated efforts with ongoing SEA or district inservice happenings. We capitalized on the CDE's Annual Conference with awareness presentations directed at administrators and teachers, made annual "pilgrimages" to a variety of professional and parent conferences to get the word out, and/or encouraged local district staff and families from implementation sites to present at conferences such as Supported Life, Cal-TASH, TASH, the Association for California School Administrators, the California School Boards Association, and the SEA sponsored statewide Parent-Professional Conference. (See Section IX).

2) Utilizing a Variety of Formats and to Reach a Wide Array of Stakeholders

We found that is was important to utilize multiple formats to reach diverse audiences, including:

a) Multi-media approaches within workshops and presentations utilizing project or state-produced videotapes, slide shows, commercially available films and tapes (e.g., Regular Lives, A Little Help From My Friends),

b) Development of extensive mailing lists and wide dissemination of brochures and newsletters written in layperson's terms, as well as brief articles or handouts describing programs and benefits,

c) Speeches to community groups at their regular meetings, such as: Developmental Disabilities Council; service agencies, and parent, professional and advocacy organizations,

d) Use of loan libraries through the project and/or State Departments of Education which publicize and disseminate project information and products statewide,(RISE-Resources in Special Education),

e) Development and dissemination of self-instruction packages that will provided introductory awareness activities which educators or parents would implement in their building or community, a particularly effective strategy for rural areas,

f) Developing grass roots/parent group presentations,

g) Coordination of tours or visits to exemplary programs or implementation sites (see below),

h) Development and dissemination of a regionalized consultant bank of speakers, representing general and special education parents, administrators, teachers, related services, and university personnel that districts and groups can bring in for presentations or consultation. (See Appendix E) An advantage to this approach is the ability for LEAs to "match" their needs with a practitioner from a similar position, type of district, or community,

i) One to two day Leadership Institutes for school principals, on regionalized best practice forums, often co-sponsored by universities affiliated with the project. These were utilized to provide awareness training as well as networking opportunities for district personnel and families.

Skill Building Level

The PEERS Project worked collaboratively with two universities, and the CA Department of Education, to provide meaningful skill-building opportunities to districts which will have longevity beyond the systems change project period by (a) institutionalizing training within these frameworks, and (b) ensuring that a large body of skilled personnel at all levels remains after the funding period.

Schattman and Benay (1992) pointed out that two important factors have contributed to the transformation of several Vermont districts into inclusive school communities: new knowledge and staff development. They noted that districts implementing integrated approaches have an increased need for inservice, yet the traditional compartmentalization of schools has often isolated staff from other staff who have the necessary expertise. These authors further asserted that effective inclusive schools have placed a priority on team approaches to staff development, including parents, and utilizing strategies such as "linking with other districts, giving teachers and parents time to meet, involving staff with institutions of higher education and participating in professional organizations" (p.12). Some of PEERS strategies included:

1) Coordination and Collaboration with IHE Preservice/Inservice Teacher Training and Research Programs in Special and General Education.

As noted above, the PEERS Project was affiliated with and/or based at two universities in the state, which provided extensive opportunities for content-specific modules or course design, in-depth institutes and workshops with opportunities for practice, co-teaching of preservice coursework focused on best practices, as well as mutual use implementation sites and coordination with IHE research or model demonstration programs. (CSU Hayward and Sacramento).

a) School Site Team Collaboration for Inclusion, a week-long institute with CSU course credit was offered by PEERS through annual CDE-sponsored innovation institutes, and covered collaborative teaming, essential practices for restructuring and inclusion, school site needs assessment, friendship development strategies, curricular adaptation and alternative instructional strategies, ability awareness education, positive behavior change, integrated therapy and addressing medical needs, school climate, evaluation, and specific school site action planning;

b) As noted above, co-development and instruction of coursework at the preservice level were facilitated by the affiliation with two universities. Syllabi have been developed and graduate level courses taught by PEERS staff at CSU Hayward, Long Beach, Sacramento and San Diego State University for the mainstreaming course requirement of all general education teacher and administrative credential students, and a course with required fieldwork has been developed and taught annually on inclusive education in the special education option at CSU, Hayward. At CSU, Sacramento, project staff teach courses in legal issues as well as methods within a graduate program which has been designed for students pursuing both general and special education credentials, thus integrating educators during their training program. (See Appendix O)

2) Mutual training demonstration site development

These strong, IHE-project ties have also led to development of mutual use sites for training, technical assistance, implementation, and research. In **California**, several of these sites were initially developed/supported by the IHE in that region for preservice fieldwork, and related activities. As sites have become incorporated into the state's California Implementation Sites (CIS) network, selection criteria and expectations of the IHE and CIS have been coordinated, and agreements for use negotiated among CIS, IHEs, and the sites themselves. This has promoted further collaboration among the three entities. (See site lists in Appendix L,M).

3) Coordination with research programs and demonstration projects

In **California**, with the proximity of the California Research Institute (CRI) at San Francisco State University, and the CSU, Hayward affiliation, staff have served on a joint Research Task Force which meets monthly to design and review research proposals. PEERS and CRI have developed and implemented two joint studies, and much of CRI's primary research has been conducted in PEERS-identified sites. (See Section VIII, Evaluation) Joint task forces of this nature have also involved additional demonstration projects through these IHEs, and have facilitated coordination of project activity with these programs, ensuring a valuable link among practitioners and researchers.

4) Collaboration with and use of State Department of Education Training Programs

The growing impact of systems change is evidenced by the collaborative inservice programs that have been established. California offers summer or periodic education innovation institutes with in-depth skill building components. These existing CDE inservice vehicles are utilized with cross-training to systems change projects, and regional roundtables or CPSD mechanisms are used to identify current and future training needs. Some examples of these innovative practices are summarized below.

a) Institutes

In **California**, institutes on inclusive education are conducted for school site teams, and single participants are ineligible. This strategy ensures that (1) general and special education on-site personnel and parents have extensive opportunities for collaborative team and skill-building, (2) Team roles and logistics as well as initial steps in curricular and instructional processes can be negotiated and tailored to the local school context, (3) all the key players receive the same information and make decisions about how to apply that information in their home schools, and (4) the attendance of a representative school team requires administrative support and commitment, which will be crucial to future effectiveness.

b) Leadership training

McDonnell and Hardman (1989), Servatius et al. (1992), and Stetson (1984), among others have written about the relationship between school leadership and systems change, and specifically, about the need for training to assist principals in meeting the new demands inherent within schools designed to include and instruct all children. As Servatius and her colleagues pointed out (1992), "if business as usual is no longer acceptable for schools, it is also unacceptable in the preparation of school leaders" (p.3). The PEERS Project recognized the need for radical changes in both preservice administrative preparation as well as inservice to practicing school leaders, and developed a variety of programs to address these needs.

1) Schools Are For All Kids I: The Leadership Challenge (SAFAK). This program, developed by Servatius, Fellows, and Kelly in 1989 for the **California** Research Institute (CRI) with contributed seed money from the California Department of Education, a two-day program which addresses themes such as creating a vision, effective instruction, promoting staff and student self-direction and building a community of leaders ready to deal with change (Servatius et al., 1992, p.3), has been delivered widely throughout California and the nation, and has conducted trainer-to-trainer workshops as well to increase the spread of effect. Two-thirds of PEERS SELPAS have participated in SAFAK workshops, with a large number of non-PEERS LEAS participating as well.

2) In **California**, regional full inclusion seminars have been sponsored by the CDE with PEERS and state inservice projects to bring practitioners together for networking, problem-solving and skills acquisition.

Finally, local training has been conducted in all targeted districts that was designed to meet the specific needs of school and district level staff. Regional, state-sponsored and IHE collaborative efforts served to augment these trainings. (See Section IX)

Evaluation

All of the activities discussed in this chapter are directed toward increasing the knowledge and skills of school communities to include students who experience severe disabilities. The effectiveness of these programs can be examined through several approaches. Questions that states and districts might ask to begin the evaluation process include:

1) Who were the target audiences for awareness level activities? Was a needs assessment or sampling of awareness level needs conducted for each constituency?
2) How was the effectiveness of awareness level strategies evaluated? Have consumer satisfaction and utility of information data been collected? What do the results indicate?
3) Which strategies were the most effective in delivering awareness level information, e.g., conferences, "road shows," incorporation within existing vehicles, materials dissemination, tours or visits to implementation sites, etc?
4) How were audiences/participants in skill-building activities selected? What types of needs assessment strategies were utilized?
5) How was the effectiveness of skill-building strategies evaluated? What do the data indicate in terms of consumer satisfaction and skill utility?
6) Which strategies were the most effective in skill acquisition? Have follow-up visits, observations to a sample of participants demonstrated positive outcomes?
7) Have modules, courses and presentation been adapted to address local needs as assessed in each community?
8) Has project staff assisted in development of school and district wide plans for inservice delivery?
9) Does the state's Comprehensive System of Personnel Development (CSPD) reflect systems change priorities?
10) How do IHEs rate the quality of courses and modules developed/taught by project staff?
11) Are there collaborative systems set up among IHEs, project/SEA, and LEAs for research training and dissemination purposes?

Summary of Selected Strategies

PEERS (1987-1992)

- Awareness Level: Presentations with local district staff and parents to local, state, and national conferences for special and general education; CDE loan library for dissemination, CDE statewide newsletter Special EDge to showcase programs and disseminate best practice information; regionalized consultant bank site visits to PEERS and other CDE Implementation Sites; co-sponsorship of one-day workshops on a variety of topics (e.g., facilitated communication, inclusion).
- Skill Building: Annual PEERS week-long inclusive education institutes for school site collaborative teams with IHE credit; SAFAK two-day trainings; preservice university course development for general and special educators; coordination with multiple university research and training programs for shared studies and data collection and development of implementation sites for mutual training use; use of CDE California Implementation Site Network for local and statewide training; collaboration with CDE existing inservice networks for (1) training, (2) systems change planning; (3) and regionalized forums on inclusion.

VI. Description of the model, activities and participants.

California is an extremely diverse state in terms of geography and population. It includes heavily populated urban and suburban areas such as Los Angeles, San Diego and the San Francisco Bay Area and extensive agricultural and undeveloped areas with sparse populations. It is also an increasingly heterogeneous population in terms of race, ethnicity, language, culture and family arrangements. The California Tomorrow Immigrant Students Project (California Tomorrow, 1990) noted the following:

- one out of nine students in the U.S. lives in California
- one in every three Hispanic American children lives in California
- two in five Asian American children live in California
- in ten years, half the children in the state will be Hispanic or Asian

- approximately 16% of students are born in another nation
- close to one in four students are language-minority

In addition to diversity, California, like other states, is dealing with many overwhelming and stressful youth related problems. While the problems of drug use, crime, alcohol, gang involvement, family separations and school drop out rates are not limited to California, the size and complexity of the state magnify these problems. California teachers are assuming a variety or roles that were previously assumed by family, church and extended community. The rapid change in California brings with it enormous challenges for schools. The practices that may have been successful in homogeneous, stable schools may not serve increasingly diverse and often more transient student populations.

In light of this changing climate, schools in California are involved in a variety of restructuring efforts, seeking to deal with changing populations, unsatisfactory student outcomes and emerging educational trends and practices. In this arena, hopes of addressing systems change for the integration of students with severe disabilities, necessarily means aligning those change efforts with overall educational change. The PEERS Project recognized early on that unless project activities took place in the context of overall educational initiatives at state, district and school site level, any meaningful change in student placement and services would be difficult, if not impossible.

Project design

Component 1: SELPA Services

The approach to statewide systems change incorporated within the PEERS project took a number of dimensions. California, through its master plan for special education, has established Special Education Local Planning Areas (SELPA), consortiums of school districts and county offices of education for the provision of special education services. SELPAs, through governance structures, manage resources and develop agreements defining the responsibilities of each participant in meeting the needs of students with special needs. Any changes in placement impact and are impacted by SELPA policies. While a school district may be interested in serving its students in a more integrated way, decisions about creating integrated options are made at the SELPA level.

PEERS provided training and technical assistance in four service cycles over the five years of the project, selecting interested SELPAs through a competitive application process. Critical elements sought in the applications were: commitment by key stakeholders including top level administrators, parents, general and special education staff; a history of movement toward integration, need, commitment to developing a representative Integration Support Team, philosophical orientation and parent involvement. In addition, geographical location and governance structure were considered to provide a representative sample within California. Over the course of the project, PEERS provided comprehensive SELPA level services to 20 SELPAs and two single LEAS including:

Ventura County SELPA
San Diego USD SELPA
North Coastal Consortium (SELPA)
Riverside County SELPA
Mid-Alameda County SELPA
Napa County SELPA
Santa Clara County SELPA III
Colusa County SELPA
Lassen County SELPA
San Juan USD SELPA
Long Beach USD SELPA
Desert Mountain SELPA
Mid-Cities SELPA
Oakland USD SELPA
Upper Solano County SELPA
Sonoma County SELPA
North Region SELPA
Yolo County SELPA
Merced County SELPA
Shasta County SELPA

Due to increasing interest by school districts who were not able to obtain SELPA agreement to submit an application for PEERS services, the last cycle was opened for individual school districts in two areas, Southern California and the Bay Coastal region. Santa Monica-Malibu USD and San Lorenzo Valley USD were selected and received PEERS comprehensive services during that cycle.

Each participating SELPA or school district established a representative Integration Support Team, including stakeholders in change. Parents, administrators from both general and special education, teachers from both general and special education, union representatives, business and transportation staff, preschool and transition agencies, state department of education staff and community agency staff had the responsibility for setting the vision for the agency, conducting a thorough needs assessment regarding the current status of integration efforts (see Appendix A), and developing a comprehensive plan for integration in the SELPA. Plans included facilities plans, inservice training, timelines for student movement, related service provision and other activities specific to each SELPA or school district. Responsibilities for specific actions were delineated and resources directed toward implementing the Integration Plan. (See Appendix B for sample plan). The PEERS Project provided facilitation for the Integration Support Teams, inservice training and on-site technical assistance as part of the agency's system change efforts. In addition, since the project was directed through the state Director of Special Education, project staff were able to assist with any waiver requests necessary for the implementation of the plan. These Integration Support Teams were critical in facilitating change at the system level.

Component 2: Integrated Implementation Site Network

California has utilized Demonstration Sites to encourage best practices in special education for the past ten years. Other projects, most notably Project REACH in San Francisco, have also worked collaboratively with local educational agencies to develop models of integration and curriculum so that administrators, parents and teachers could experience a particular innovation first hand, observing, speaking with people in the same role and actually practicing their skills in real environments. In each SELPA and school district participating in the project, PEERS staff worked with the local staff to develop at least one program demonstrating best practices in integration and inclusion. *Implementation Site Criteria* and later, *Implementation Site Criteria for Full Inclusion Programs* (see Appendix C) were developed and utilized in site selection. These Implementation Sites are resources to the district and SELPA and are used extensively by individuals from other local educational agencies throughout the state. In some SELPAs or districts, more than one site has been selected, and in others, sites are in development. (See Appendix L for Sites List)

Implementation site teachers and administrators have been involved in California Implementation Sites, a statewide network of sites exhibiting best practices. Other statewide training programs, for example Training and Resources in Community and Curriculum Integration (TRCCI), the state's inservice unit for severely handicapped, and California Deaf-Blind Services are also involved in this Implementation Site network. Through this network, teachers, both special and general education and often administrators attend an annual conference to share ideas, resources and materials and receive inservice training.

Implementation Site staff also co-present at local, state and national conferences and within local educational agencies as part of PEERS training efforts.

Component 3: Provision of inservice training to key Department of Education (CDE) audiences

In recognition that local educational agencies operate within policies established and maintained by the California Department of Education, and that those policies in some cases have acted as a disincentive to the creation of integrated options, the project directed a portion of its resources and energy to state level change. Meetings with the state Director of Special Education, (also the Project Director), were held regularly to advise him of issues and concerns related to integration as they emerged through the Integration Support Teams and to discuss potential state level actions to support integration. PEERS staff also provided inservice training on integration and inclusion to Special Education Division consultants at the department. Updates on project activities were provided to these special education consultants periodically, particularly as they were involved in coordinated compliance reviews with participating SELPAs and districts. In some areas, Special Education Division consultants were involved on the SELPA Integration Support Teams. This proved to be particularly beneficial in interpreting Department of Education policy and procedures, clarifying flexibility in state policy and facilitating waiver requests.

Throughout the project, CDE Special Education consultants were invited to the project advisory meetings to provide information and to gather input from advisory members regarding policy changes. Consultants from the infant-preschool unit, program curriculum and training unit, program development unit, facilities planning unit and statewide programs unit provided information to the advisory board on such topics as child count procedures, facilities planning, regionalization, PL 99-457, and interagency collaboration. The consultants also received input from PEERS Advisory Board members regarding department level policies and practices. For example, California child count data collection strategies were changed to more clearly determine where students were being served. In meeting with the administrator of the facilities planning unit, project staff and advisory members were able to advise her of the difficulties in dedicated space for special education as school districts were completing building plans.

PEERS Project staff periodically provided training to other state sponsored training programs, for example Training and Resources for Community and Curriculum Integration, California Deaf-Blind project, California Implementation Sites and Positive Behavior Change. Bi-monthly joint staff meetings were held among these projects and in addition to training on systems change for integration, curriculum adaptation strategies and student planning strategies, materials developed by the project were provided to be incorporated within statewide training.

Component 4: Collaboration with University/Institution of Higher Education (IHE) Research and Training Programs in Regular and Special Education

The PEERS Project, as a statewide systems change project, was designed to provide training and technical assistance for general and special educators and parents in school systems and to assist in restructuring the system to support integration. It is also apparent that university training programs need to reflect best practices in integration, particularly in credential programs for special and general education. The project accomplished this on several levels: IHE involvement with the Advisory Board, participation in IHE sponsored research, development of training materials, development of curriculum material and direct involvement in credential and masters degree programs.

The PEERS Project included IHE representatives as members of its Advisory Board to bring issues related to teacher training programs and to participate on the PEERS Advisory Board task forces. Information generated through these task forces focused on governance, pre-school and transition options and related service delivery, among other issues and provided project staff and California Department of Education staff with information to support systems change.

Early in the project, PEERS participated in the National Study of the Implementation of the Least Restrictive Environment Policy, a three year OSEP funded project through the University of Vermont. Project staff also arranged visitations to PEERS model sites and for interviews with educators and parents as part of the Research Triangle Institute's Center for Integrated Education's national effort to identify model implementation sites.

The PEERS Project also worked closely with the California Research Institute, at San Francisco State University on research related to indicators affecting placement in integrated settings, the quality of IEP objectives in special classes and inclusive programs, outcomes of inclusive education and strategies for statewide systems change. PEERS, the Colorado Statewide Systems Change Project and CRI also collaborated on a manual, Curriculum Adaptation for Inclusive Classrooms (Neary, Halvorsen, Kronberg and Kelly, 1992). , which provides information on establishing and supporting inclusive programs, and CRI, with PEERS co-authored a systems change manual (Karasoff, Alwell and Halvorsen, 1992). (See Appendicies F, G, H) PEERS staff were also involved with CRI, the California Department of Education, Special Education Division and the CSUH Educational Leadership Department in the development of the Schools Are For All Kids (SAFAK) training, now being offered nationally.

PEERS Project staff have been involved throughout the five years of the project in California State University credential programs at CSU-Hayward and CSU-Sacramento. Staff provided training in the credential programs for severely handicapped and also in the required class for general education teachers in mainstreaming. During the three years of the project, one of the PEERS staff in southern California was also involved in the education department at CSU-Long Beach in mainstreaming and at Loyola Marymount University in Los Angeles in the severely handicapped program. In the final year of the project, one of the project staff was also an instructor at California State University, Los Angeles in the special education department.

One of the PEERS staff was also involved in developing training materials and providing training for the Regional Resource Center on Community Referenced Nonaversive Behavior Change, a federally funded project to train state training teams in positive behavior change, which has been associated with 7 IHEs: CSU Hayward, San Francisco State University, University of Oregon, UC Santa Barbara, University of Kansas, State University of New York at Stonybrook, and University of South Florida.

Component 5: Collaboration Between Regular and Special Education and Related Services at Local/State Levels

It is clear that success in integration and certainly inclusion depends to a large degree on the interest, attitude and preparation of general education staff. It is also evident historically that many general educators had little information or training in serving students with special needs, particularly those with severe disabilities. Departments of Education at the state and at local levels have traditionally separated regular and special education and even inservice training has neglected bringing these two groups together. The PEERS Project addressed collaboration between regular and special education through a variety of means, including participation at the state and university level, collaborative planning at the local level and joint inservice training.

The PEERS Project Advisory Board, which met quarterly, included general education teachers who were also union representatives from the California Teacher's Association and the California Federation of Teachers. This participation allowed acknowledgement of issues from a general education perspective and the opportunity to meet the needs of regular education classroom teachers in integration. Having the union perspective was also helpful in working through systems change. Three task forces operated through the Advisory: a Governance task force which identified competencies for administrators integrating students with severe disabilities and participated in the development of the Schools Are For All Kids (SAFAK) trainings; the Related Services task force, which developed recommendations for delivery of related services in a transdisciplinary model and infused these practices into PEERS inservice training; and the Pre and Post School Transitions task force which worked to coordinate the multiple agencies involved at these two levels.

Also at the state level, one of the PEERS Project staff worked on the California Department of Education LRE Task Force and the follow-up Primus Group, involving general and special education administrators, teachers, university faculty and parents. This group focused on full inclusion, specifically on quality indicators and the role of state and project personnel in promoting full inclusion. A video tape is currently in production for field use.

As noted above, project staff were involved as faculty members in the California State University system, providing classes in mainstreaming for general educators as part of their credential requirement. Project materials,information and participating parents, special and general educators have been utilized in these mainstreaming classes to provide state of the art perspectives.

At the local level, general education administrators and teachers were required members of the Integration Support Teams in SELPAs and school districts participating in the project. They assisted in gathering information about the current status of integration in the SELPA or district, identified critical issues among general educators and also acted as liaisons with other general educators and the unions operating in the district.

Finally, the Project has presented at numerous national, state and local conferences throughout the five years. (See Section IX) Both general and special educators have participated as co-presenters with PEERS Project staff at these conferences (e.g. TASH, Cal-TASH, CEC, Supported Life, Integrated Resources, Valuing Diversity Conference, Region J Coordinating Conference). Each year of the project, a week long summer institute has been held involving school site teams with the site principal, special and general educators and parents, (See Appendix D). A panel of special and general educators from inclusive schools has presented as part of this institute.

It has been evident throughout this project that any planning and training for integrated services must be done collaboratively at all levels- state, SELPA, district and school site level, because it involves restructuring at each level.

Component 6: Revision of CDE Child Count Procedures.
As noted above, collaboration with key Department of Education consultants has occurred throughout the project. CDE consultants have met with the Advisory Board and project staff on a number of topics, one of which is the child count reporting format across the state. Previously, child counts did not differentiate placement on special centers and special class placement on integrated sites, because both were listed as special day classes. This made it difficult for the state to recognize the extent of segregation in California. Lalit Roy of the California Department of Education met with the Advisory Board and staff to receive suggestions about changes and as a result, a new reporting format was developed which allows CDE to distinguish between these two placements by adding a new data field documenting the amount of time of integration for each student. It is anticipated that this will now allow California to generate data to evaluate progress in meeting the spirit and letter of the Individuals with Disabilities Education Act (IDEA).

In addition, the Advisory Board and Project staff also made Mr. Roy aware of the implications of California fiscal policy related to full inclusion. As discussed in section VII, Logistical Problems, current funding formulas require students who are fully included to be funded as part of a special day class. This allows for sufficient support for these students. The language defining special day classes in California law requires students to spend a majority of their school day in these classes. Districts and SELPAs operating fully inclusive programs have had to request a waiver from the Department of Education on this definition to maximize integration while maintaining fiscal integrity. One outcome of this discussion was that the SELPA Directors organization representative to PEERS served as a liaison to the Management Information System (MIS) subcommittee at the department.

Component 7: Disseminate project activities, materials and resources.

During the five years of the PEERS Project, dissemination of project information has occurred at local, state, national and international levels. Project staff have responded almost daily to requests from parents, teachers, administrators and community agencies regarding best practices in integration and inclusion. (See Sections VIII, Evaluation and IX, Impact).

Local level

As noted in the first component of this project, SELPA services, project staff have worked through the SELPA/District Integration Support Team to develop inservice plans for special and general educators, parents, students and community members. Training in rationale for integration, best practices, curriculum adaptation, transdisciplinary team functioning, ability awareness, behavior change strategies, collaborative planning and working with families has been provided as part of these services and specific to each participating agency. Training was provided by PEERS Project staff and by consultants to the project. A number of consultants have been identified from a broad range of roles, including parents, board of education members, general and special education teachers, administrators, community members and university staff. (see Appendix E). Materials developed through the PEERS Project were provided through these local inservices.

In addition to participating SELPAs and Districts, project staff also were called on numerous occasions to provide inservice training on the topics noted above to community agencies, (such as the Regional Centers, the Developmental Disabilities Area Boards), to local county office programs and school districts and to parent groups. Project staff were also requested to present at SELPA and district "back to school" inservices on a regular basis. Video tapes and printed materials (texts, documents) have been loaned by the project frequently throughout the five years. (See Section IX)

Information regarding the project and participating SELPAs and districts has been included in local newspapers such as the Davis Enterprise.

Finally, inclusion seminars have been held locally in different parts of the state by PEERS staff in collaboration with other projects and IHE staff. These have been very successful grass roots efforts.

State level (See also Section IX< Impact)

State level dissemination included presentations at several state conferences. Project staff, in collaboration with local educators and parents, have presented at Cal-TASH, the Parent/Professional Collaboration conference, the Region J Coordinating Conference, Supported Life, the Stanislaus Spring Conference, the Integrated Resource Conference, Valuing Diversity Conference and the Special Education Innovation Institute among others. Project materials and information on participating SELPAs and districts have been provided at these conferences.
Project staff have also presented at the SELPA Director's organization meetings, updating these administrators on project activities and progress in integrated practices. As noted above, one of the project staff participated on the state level LRE task force, providing input regarding full inclusion and barriers to integration statewide.

Articles regarding the project and materials and resources relating to integration and inclusion have been included in the Special Edge, a statewide publication supported by the California Department of Education, with circulation to 25,000.

National level

At the national level, PEERS Project staff and local general and special educators and parents have presented at the International TASH conference in each year of the project regarding project activities and best practices in systems change, and at the CEC conference in several project years.

Presentations have been made at the CRI topical workshops in Washington, D.C to ten state systems change projects on effective strategies at the state, local and student levels. Project staff collaborated with CRI and the Office of Special Education and Rehabilitation Program in Washington to develop Effective Practices for Inclusive Programs: A Technical Assistance Planning Guide (Simon, Karasoff and Smith, 1992; Appendix F) and again with CRI to develop Systems Change: A Review of Effective Practices (Karasoff, Alwell and Halvorsen, 1992; Appendix G).

Other materials developed through this project were also disseminated at the CRI topical workshop in Colorado in 1992, including the Integration/Inclusion Needs Assessment (Halvorsen, Smithey, Neary and Gilbert, 1992; Appendix A), Implementation Site Criteria for Full Inclusion Programs (Halvorsen, Neary and Smithey, 1992; Appendix C), and Guidelines for Full Inclusion (Neary, Halvorsen and Smithey, 1992; Appendix I).

Project staff also worked with the Research Triangle Institute (a federally funded project) to examine a number of integrated sites for national listing. The project also participated in a study through the University of Vermont on implementation of LRE and also with CRI on a recently published study (Hunt and Farron-Davis, 1992) on the quality of IEP objectives in general education versus special education classes.

PEERS Project Implementation Sites have also been a resource nationally with teams from Michigan and Guam visiting to discuss inclusion.

Through the Special Education Innovation Institute, a California Department of Education sponsored inservice training program, the PEERS Project has developed School Site Teams for Inclusive Education: A Training Institute (Neary, Halvorsen, Gilbert and Terry-Gage, 1992; Appendix D), a comprehensive training guide for a five day institute. This training guide includes trainer's notes, directions, training materials and an extensive bibliography. (See Appendix D). Project staff, in collaboration with CRI and the Colorado Statewide Systems Change Project developed Curriculum Adaptations for Inclusive Classrooms (Neary, Halvorsen, Kronberg and Kelly, 1992 Appendix H), a manual addressing school, classroom and student level strategies for supporting inclusion. Requests for materials and information project staff supported came from South Carolina, Washington, D.C., Massachusetts, Oklahoma, Kansas, Louisiana, Connecticut, New York, Pennsylvania, Virginia, New Mexico and Hawaii among other locations. See Sections VIII and IX).

At the international level, visitors from Switzerland and Norway observed in PEERS Implementation Sites and materials developed through the project were provided for incorporation in teacher training in Switzerland. Materials have also been requested and sent to Flinders University of South Australia, to New Zealand, Germany, Guam, Singapore and France.

Component 8: Evaluate Project implementation and outcomes. Project evaluation occurred on a number of levels and through a variety of activities relating to project management, consumer satisfaction, student transitions, and research specific to student variables, such as analyses of IEPs, student schedules and interactions of participating students as discussed in Section VIII.

The PEERS Project maintained accountability through a management by objectives strategy. As a project through the

California Department of Education, memos of understanding and subsequent contracts have been in operation with each participating regional fiscal agent (United Cerebral Palsy Association of Sacramento/Yolo Counties; California State University, Sacramento, California State University, Hayward and Saddleback Unified School District) which describe accounting procedures. The project operated in a fiscally sound manner throughout the five years.

As noted above, the provision of inservice and technical assistance has been a central part of PEERS services and consumer satisfaction data have been collected following all inservice sessions. In addition, qualitative data have been collected with a sample of parents in three of the participating SELPAs one year after integration regarding support during the integration transition period. Of the eight interviews conducted, six were extremely positive and the other two attributed any problems to a lack of teacher skill in each case, rather than to integration itself. The questionaire utilized was developed by Hanline and Halvorsen (1989); Appendix J).

During Year 03-04, in depth interviews were conducted with administrators and teaching staff covering planning, implementation and evaluation of the systems change process. Those interviewed were also asked to rate PEERS services on a scale of 1-5 where 5= excellent. The following were found: philosophical support for integration (x=4.2); strategies for integration (x=4.4); administrative support (x=4.5) and parental support (x=4.7).

PEERS staff also compiled detailed descriptions of state, local, classroom and student level strategies for systems change found to be effective and provided them during a CRI Topical workshop in 1990. As noted above, these are part of Systems Change: A Review of Effective Practices, developed in collaboration with PEERS Project staff. (Appendix G).

One of the most important outcomes of the project regards actual changes in placement for students to more integrated options. As noted in the original proposal, California had upwards of 350 special centers with approximately 20,000 students served in those isolated sites. The project also worked to improve the integration of those students who were served on regular school campuses, but might not have been included with other students except at lunch and recess. During the last three years in particular, the PEERS Project became involved in developing inclusive options in participating SELPAs and districts. Student transitions are noted below under Section VIII, Evaluation and Section IX, Impact. While California continues to have a large number of students served in restrictive settings, the project has had a major impact in reducing the number and improving the quality of interactions for those students on regular school sites. Indirectly, the project has also had a significant impact on services to students outside the project's scope. The Department of Education, Special Education Division is currently moving forward to implement its Strategic Plan for Special Education, which calls for prevention and a focus on services rather than placement, a new funding model to support integration and continued training and dissemination of materials and information on integration. Research, Development and Demonstration sites in local districts are also being established through three universities (CSU-Sacramento, CSU-Northridge and San Diego State University) to develop innovative service delivery systems for special education.

During the last two years of the project, research was conducted by CRI in collaboration with PEERS Project sites to examine several critical variables related to inclusion. The quality of IEP objectives of students served in inclusive classrooms as compared to similar students served in special day classes was examined. Hunt and Farron-Davis, (1992), found increases across all seven indicators of best practices in the inclusive classrooms. In an interesting finding, community based instruction was also not ignored in inclusive classrooms, rather there was no statistically significant differences in the curriculum areas targeted between special classes and full inclusion programs. (See Section VIII, Evaluation).

VII. Methodological/Logistical Problems and Resolution of these

A. California governance and funding structure

In California, as in many states, a dual, and sometimes three-tiered governance system for service delivery of special education can provide significant barriers to systems change for inclusive education. California has approximately 1040 school districts (LEAS), as well as a county office of education, (COE) in each of its 58 counties, and planning consortia for special education known as Special Education Local Plan Areas (SELPAS) which may be single-district (e.g. San Francisco), multi-LEA (as many as 42 in one PEERS' SELPA) or multi-LEA in conjunction with the county office of education, depending on population size and geographic area. Historically, few LEAS operated their own special education programs for students with significant disabilities, and some rural areas had, in effect, relinquished responsibility for all of their special education programs to this intermediate agency in the 1970's.

This situation was exacerbated by a funding formula which, in essence, provided an incentive for sending students to COE-operated programs. Until 1988, most LEAS received a significantly lower 'support service ratio' (SSR) for program operation than did COE programs. This SSR is money which is added to the basic "unit cost" which is provided for instructional personnel to staff a "special day class". For example, the unit cost might be $100,000 for a teacher and paraprofessional, with benefits (although not fully state-funded at this level). A county SSR for this unit in this scenario would be as high as .78, or $78,000 added to the unit cost to cover related support services. However, districts in that same county might have had an SSR as low as .23, and would thus receive only $23,000 in support for operating the same classroom program. This meant that LEAS had a great deal of reluctance about starting and running their own programs, since there was a strong discentive to do so. California's funding system tends to further diminish local ownership of students with disabilities since it is a state based system for all education, with approximately 70% state/federal funding and only 30% local input, unlike most states.

Several structural changes which have occurred since the PEERS project's inception, and others now in progress, have led/are leading to resolution of these issues.

(1) AB 4074 - Transfer of Program Act, 1988
This bill, now codified in the Education Code, provides a mechanism to diminish and/or remove totally the financial disincentive to locally-operated programs. The bill's concept was developed by the PEERS' Project Director, Patrick Campbell, then State Director of Special Education, and brought to the state assembly during PEERS' first year. The Support Service Ratio calculation was changed in the case of program transfers from, e.g. COE to LEA, so that the LEA could obtain either the same SSR as the county, or, if their salary (unit) costs exceeded the COE then they could obtain a weighted average between the two SSRS. Districts and SELPAs that took advantage of this change and brought back their students from county operated segregated programs to LEA integrated schools, with PEERS' assistance included: Napa, Santa Rosa, Berkeley, Alameda, Hayward, San Lorenzo, Castro Valley and San Leandro, as well as LEAS in the North Coastal and Ventura Areas of Southern California. Dozens of other non-Peers LEAS in the state have also transferred programs back to local operation or are working on impending transfers at this time. This is a first step toward local ownership and inclusion, but it is a critical one. Removal of this barrier has provided a major catalyst for moving toward inclusive education, particularly in light of current fiscal constraints.

(2) Waiver process for inclusive education
This has been both a barrier and a solution, depending on how it is utilized. California's placement continuum includes "special day class" or SDC, which, historically, may be located in a center or at a regular school. The SDC is described as being the option for students who need to be in that environment at least 50% of the school day. SDC's are funded with one teacher and one to two paraprofessionals for 10 students. LEAS must maintain an average of at least 9 students across SDC's, or they begin to lose SDC units. The barriers this has provided are several. Since students must "be" in an SDC 50% of their time in order to receive intensive services (10:2 or 3 ratio) then they cannot be legally fully-included! The

alternative is to utilize Resource Specialist support, however, that carries a 1:28 ratio, which is inadequate for support of students with severe disabilities in general education classes of 30-plus students.

The two overiding issues here are a) funding does not follow individual students but rather is attached to units of 9 or 10 students and b) the legal requirement of being part of an SDC for at least half the instructional day. The current solution PEERS engaged in with LEAs is to assist them in a Waiver Application to the State Board of Education to waive the Ed Code Section which applies to SDC, arguing for use of the SDC ratio in an itinerant manner, with the three staff providing support services to up to 10 students in their home school age and grade-appropriate classrooms. This process is difficult and can provide a barrier in itself, particularly if districts are hesitant to begin with, since it is time-consuming and lengthy. (See Appendix K) Legislation was proposed with PEERS' input in 1992 to change the Ed Code to allow an itinerant support model, but it was blocked by coalition of SELPAs and some department personnel. Future strategies now in planning stages at the CDE include a) revising the entire funding model to be based on district ADA (average daily attendance). This would allow LEAS to develop their own support service models based on individual student needs and local situations, and, b) revising the education code sections or developing an efficient waiver-processing system for this particular Ed Code section.

(3) Restructuring demonstrations Two state initiatives, SB 1274 and 620, target funds to overall school restructuring efforts. The first initiative is focused on structural/system as well as process variables at the site level, and about 200 planning grants were awarded to schools in 1991, with approximately 200 more for implementation in 1992. The majority are targeted toward schools with low SES and low achievement scores, and restructuring plans are expected to include all students and staff in the school. However, only about 25% of grant recipients in 1991 addressed special education. In order to demonstrate its support for special education as a part of restructuring efforts, the CDE issued a technical assistance grant to the California Research Institute (CRI)

for those sites. CRI then assessed school site needs and provided individualized assistance, including scholarships for teams to attend PEERS' week-long institute on Inclusive Education. (See Appendix D)

The second initiative, SB 620, which began in 1992, is focused more on restructuring for coordinated service delivery, particularly health services, to schools with low SES students, but also includes attention to system and process restructuring. PEERS staff feel strongly that inclusive education must be incorporated within overall general education reform and restructuring, as noted earlier in Section V. Several examples have emerged in our LEAS of inclusive education "driving" reform efforts, or being a catalyst for change, or, at minimum, being incorporated within that change effort. The following tables illustrate examples of this.

TABLE 2
INCLUSION: DRIVING REFORM EFFORT

INCLUSION SHOWS UP DYSFUNCTION IN SYSTEM (NORMAN KUNC, 1992): NEED FOR NEW VISION

TEACHER TRYING INNOVATIVE INSTRUCTIONAL STRATEGIES (ACTIVITY-BASED, THEMATIC, COOPERATIVE LEARNING) WITH ALL STUDENTS AS A RESULT OF USING THEM WITH INCLUDED STUDENT (E.G. RAINFORTH, 1992)

COLLABORATIVE TEAM MODEL PROVIDES A NEW MODEL FOR INTERACTION ACROSS THE SCHOOL (NAPA)

PEERS SUPPORT SYSTEMS HAVE SCHOOL-WIDE APPLICATION

USING SPECIAL EDUCATION RESOURCES DIFFERENTLY (E.G., TEAM TEACH, ITINERANT, PRE-REFERRAL SUPPORT) STIMULATES SCHOOL TO RETHINK USE & STRUCTURE OF ALL RESOURCES

TABLE 3
INCLUSION: PART OF OVERALL REFORM

SPECIAL EDUCATION COMMUNITY HAS AN ACTIVE ROLE IN DEVELOPING NEW VISION & MISSION FOR ALL SCHOOLS (E.G. COMMERCE CITY CO) & OVERALL STRATEGIC PLAN (E.G., SAN LORENZO VALLEY-AWARENESS CURRICULUM EMPHASIS)

TEACHERS WORK TOGETHER WITH ADMINISTRATION & COMMUNITY ON SCHOOL RESTRUCTURING COMMITTEES FORM OUTSET (E.G., MINIMUM & LONGER DAYS - NAPA)

SPECIAL EDUCATION'S COMMUNITY INVOLVEMENT & EXPERIENCE CAN BE ASSET TO TOTAL SCHOOL (PARENTS, VOLUNTEERS, BUSINESS, SERVICE AGENCIES)

SPECIAL EDUCATION CHANGES & NEW OPTIONS ARE DELINEATED IN OVERALL RESTRUCTURING PLAN (E.G., RETURN TO HOME SCHOOL, INCLUSIVE EDUCATION, SERVICE NOT PROGRAM BASED, TEAM TEACHING WITH GENERAL EDUCATION, BLOCK SCHEDULING OF RELATED SERVICES)

PROGRAMS DEMONSTRATE EXCELLENT FIT WITH OUTCOMES-BASED EDUCATION

The restructuring focus at the site/district level in California further supported the project's movement form SELPA level work to district/school site level in the final two years.

B. Departure of Southern Region Coordinator in Final Year (Lynn Smithey)

Ms. Smithey left the PEERS project in September, 1991, when opportunities in an area LEA provided a more attractive salary and potential longevity than the project was able to offer. The position was advertised in statewide newsletters, over Specialnet, through district and university mailings, and in the national TASH newsletter from October-November, 1991. Applicant screening took place in December, and the position was offered and accepted in January, 1992 by Suzanne Gilbert. In addition, since we had experienced salary savings in the Fall, Suzanne Terry-Gage, a doctoral candidate at CSLA with a significant amount of training/consultation experience, was hired part time to work for the project's duration. The Northern California staff had provided phone consultation, materials, on-site technical assistance and inservice training to requesting SELPAs/LEAs in the Fall of 1991, so that these LEAS were not without services. Full services were then picked up by Ms. Terry-Gage and Gilbert beginning in February, 1992.

VIII. Project Evaluation

A. Student Transitions from segregated to integrated settings

As noted in Sections VI and IX, during the five year period PEERs worked with 20 of Californias 111 SELPAS/LEAS, representing about 250 of the state's 1040 districts. SELPAS ranged in size from single district SELPAS (Oakland, San Diego) to multi-LEA/COE SELPAs with as many as 42 districts (Sonoma County SELPA) and everything in between. Population size of the students with severe disabilities within these LEAS ranged from a few dozen students to over 700. All SELPAS were either operating one or more centers for students with severe disabilities at the initiation of project activity (see previous reports/continuation proposals) or were sending at least some students to a neighboring SELPA/LEA Center or a nonpublic school. (See previous reports/continuation proposals).

As Table 4, Students Integrated in PEERS SELPAS indicates, more than 3000 students with severe disabilities obtained integrated school options during the five year period. In addition, 16 of the 20 SELPAS now offer inclusive education as an option in one or more LEAS in their SELPA, for a total of 66 inclusive schools, ranging from preschool settings through high school, and addressing PEERS guidelines for inclusive education (Neary, Halvorsen & Smithey, 1992, see Appendix I). These numbers are continually growing, and three PEERS SELPAS will be expanding their existing elementary inclusive options to middle and high school on the Fall of 1993.

(Insert Table 4 here)

Table 5 lists additional LEAS/SELPAS which have developed inclusive options in California, and have been involved with Peers for materials, resources, intensive summer institute trainings, phone consultation, linking with Peers SELPAS/LEAS and/or with Implementation Sites for technical assistance. The PEERS Consultant Bank (See Appendix E) was utilized here as well. This list of 20 LEAS includes only those with which PEERS has had some direct contact, and we are well aware of multiple additional inclusive programs throughout the state.

B. Special Education Centers

A second major area of impact is the number of isolated facilities in the state, or special education centers. In 1987, in preparation for the PEERS proposal, staff of the California Research Institute conducted a telephone survey statewide to determine the number of centers and students with severe disabilities who were segregated. (Farron-Davis & Halvorsen, 1987). The data collected indicated that there were 300 centers serving approximately 20,000 students. In 1989, Betty Hansen, CDE Facilities Lead Consultant reported to the PEERS Advisory Council that her new data indicated a total of approximately 200 centers statewide. In PEERS SELPAS alone, more than 20 centers closed during the project period, with many converted to alternate uses such as preschool consortia, offices, regular elementary schools or adjuncts to elementary/ secondary schools.

C. Specific Research Studies

1. Hanline, M.F., & Halvorsen, A.T. (1989) Parent perceptions of the integration transition process: Overcoming artificial barriers. Exceptional Children (55), 6, 487-92. PEERS and the San Francisco State University STIP Project (Student Transitions from Infant Programs) co-sponsored this

Table 4
Student Transitions in PEERS SELPAS

U = Urban
R = Rural
S = Suburban

SELPA/LEA			# INTEGRATED	# INCLUSIVE PROGRAMS	
U	1.	Oakland U.S.D.	approx. 500 more than 40 schools now have integrated pro-grams)	12:	5K, 5 preschool, 1 elementary, 1 middle school
U,S	2.	Mid Ala. County SELPA	212	2	elementary, middle
S	3.	North Region SELPA	200	2	elementary schools
U,S	4.	Santa Clara SELPA III	155		------------
S,R	5.	Napa COE SELPA	175	8	elementary Schools
S,R	6.	Upper Solano COE SELPA	175		-------------
S,R	7.	Sonoma COE SELPA/Santa Rosa U.S.D.	50	7	elementary schools
S,R	8.	San Lorenzo Valley U.S.D.	15	2	elementary schools
R	9.	Colusa COE SELPA	40	7	preschool, elementary middle, high school
S,R	10.	Merced COE	117	1	elementary school
S,R	11.	Yolo COE SELPA	58	3	elementary schools
R	12.	Lassen COE SELPA	30	2	elementary schools
U,S	13.	San Juan U.S.D. (SELPA)	90	2	elementary schools
R	14.	Shasta COE	115		--------------
U	15.	Long Beach U.S.D.	160		--------------
U,S	16.	Ventura COE SELPA	210	1	elementary school
U,S	17.	North Coastal SELPA	100	2	elementary schools

U	18. San Diego	700*	12:10 elementary, 1 middle & 1 high school
U,S	19. Mid-Cities SELPA	75	---------------
S,R	20. Riverside COE & LEAS	100	1 elementary (more targeted for 1993)
U,S	21. Santa Monica-Malibu LEA	50	1 high school
		students integrated	PEERS SELPA/LEA Inclusive Sites
Current Totals		3327	66

* OUSD had only 20 students integrated prior to PEERS participation beginning in 1988. SDUSD has 73 classes at 56 school sites, compared to 33 classes at 13 sites in 1985-1986. See Section IX. These two districts have each closed 2 special centers.

Table 5

Indirect Project Impact: Inclusive Programs in Non-PEERS Districts

1. Belmont
2. Burlingame
3. Cabrillo USD
4. Chula Vista
5. Elk Grove
6. Fremont
7. Fort Bragg
8. Fullerton
9. Galt
10. Livermore/Dublin
11. Los Angeles USD
12. Marin COE
13. Redwood City
14. Saddle Back Valley USD
15. San Francisco USD
16. San Mateo COE
17. San Mateo Union High School District
18. Santa Cruz City
19. Ukiah
20. Watsonville (Pajaro)

qualitative study of parents' transition experiences from segregated to integrated settings. (See Appendix J) Parents of 14 students participated in interviews to evaluate the support they received during their child's transition to an integrated educational placement, to explore their concerns and to discuss the effects of integration. Although parents identified several areas of concern, they consistently expressed satisfaction regarding the outcomes of integrating their child including professional and personal support. Responses emphasized the importance of commitment from LEAS and professionals, an individualized approach to parent involvement, and ongoing communication with parents.

2. Halvorsen, A., Coots, J., Raley, M., and Neary, T. (1991) Comparison of the quality of IEPS across two districts pre and post integration. The project collected randomly selected students' IEPS from elementary students in two participating districts (one northern, one southern California) and conducted pre/post analyses of their quality utilizing the instrument developed and validated by Hunt, Goetz and Anderson in 1986, and which has been utilized in a variety of studies over the past several years. (See also below). The data depicted in Table 6 illustrate the results and areas of significant differences. utilizing a series of Wilcoxen two-tailed tests for samples of unequal size. For District B, a large urban LEA, there was a significant increase in objectives which required interaction with nondisabled peers, as well as in objectives which infused generalization opportunities and requirements in the objective's conditions. For District B, a suburban area, there was also a significant increase in objectives including interaction, and a significant increase for both LEAS in the quality of objectives (# of quality indicators reflected). These findings supported the project's hypothesis that well planned integration would positively affect IEP quality overall, and specifically in terms of documented interaction opportunities.

(Insert Table 6 here)

Table 6 - PEERS IEP DATA

	A	B	C	D
1		District A	District B	Total
2		pre	pre	pre
3		Means	Means	Means
4	# of obj	19	12.67	14.78
5	% pts from total	51	34.33	39.89
6	Avg pts per objective	3.57	2.49	2.85
7	% CAA Mats	80.50	55.83	64.05
8	% CAA task	81.67	55.25	64.05
9	% Basic skill	53.67	81.00	71.89
10	% Critical activity	56.83	24.50	35.28
11	% Integration	11.83	2.75	5.78
12	% Generalize	26.33	0.67	9.22
13	% Natural setting	45.33	28.42	34.05
14		District A	District B	Total
15		post	post	post
16		Means	Means	Means
17	# of obj	19.17	13.92	15.58
18	% Pts from total	54.67	40.38	44.89
19	Avg pts per objective	3.84	2.82	• 3.14
20	% CAA Mats	.84	63.85	70.21
21	% CAA task	82.33	63.85	69.68
22	% Basic skill	63.67	69.08	67.37
23	% Critical activity	48.17	32.77	37.63
24	% Integration	• 20.17	• 10.08	13.26
25	% Generalize	27.33	• 3.31	10.89
26	% Natural setting	57.67	35.51	42.37

• = $p < .05$

A second IEP study conducted by the California Research Institute on Integration (G0087C3056-90) by investigators Pam Hunt and Felicia Farron-Davis (1992, JASH, 17 (4), 247-253) utilized some PEERS implementation sites in an investigation of IEP quality and content associated with placement in general versus special education classes. As with the previously described IEP study conducted by PEERS, IEP quality was evaluated on the basis of the degree to which educational objectives included the seven components identified as best practices. In contrast to the first study, this study actually compared IEPS of students integrated from a special classroom base, to those of students who were members of their age and grade-appropriate regular education class with specialized support. No difference was found in the curriculum content of IEPS across the two programs, however, a significant difference was found in the quality of IEP objectives, with higher overall scores for the IEPS written when students were members of general education classes. It is important to note that this study utilized only those teachers who had moved with those students from special class to inclusive placements, thus controlling for the teacher variable as well as for any student variation. It is also important to note that, although the IEP instrument was developed prior to the genesis of inclusive education as we know it (Hunt et al, 1986) the IEPS reflected higher quality overall, just as the IEPS in the above- mentioned study were demonstrated to be of higher quality than those for students in segregated settings. If the IEP is considered as documentation of actual instructional opportunities and priorities, as is its intent, then these findings also fit well with those of Briner and Thorpe (1984), nearly a decade ago, who found that the rate of interaction of students with their nondisabled peers accounted for a significant proportion of the variance or, was a predictor of, achievement of IEP objectives.

3. Beckstead, S.P., Hunt, P., Goetz, L., Karasoff, P. & Halvorsen, A.T. (1992) An analysis of student outcomes associated with educational programs representing full inclusion and special class models of integration. San Francisco: CRI, unpublished manuscript.

This descriptive study is an initial effort to provide a comprehensive picture of the structure, educational practices, and associated positive student outcomes of integrated program for students with severe disabilities across a variety of California communities. Three of the seven participating programs represented the full inclusion model of integration implemented at the elementary school level. Four of the programs represented special class models of integration; two were located at elementary schools and two at high schools. The study presents descriptive information on each of the models of integration with quantitative measures of positive student outcomes associated with each model. Outcome measures in this preliminary study were restricted to the quality of the students' individualized education programs (IEPs), the extent of integrated activities for each child across the school day, and the extent and type of interactions occurring between the students with disabilities and their nondisabled schoolmates.

Program Evaluation Outcomes

Quality of IEP objectives. As described in Figure 1 the high school special class model of integration received the highest percent points for overall IEP quality (85%) as evaluated by the IEP Instrument, followed by the full inclusion model with 71% and the elementary special class model with 60%. Each of the three integration models received high scores for IEP objectives that included age-appropriate tasks and materials. Basic communication, social, motor, and academic skills development were included in 78% of the objectives for full inclusion programs, 85% of the objectives for elementary special class programs, and 69% of the objectives for high school special class programs.

IEP objectives written for programs in the high school special class model included a substantially higher percent of targeted critical activities (79%) than IEP objectives written for the elementary special class programs (34%) or the full inclusion programs (53%). This may reflect a shift in curriculum priorities at the high school level to domestic, community, and vocational skills development as advocated in functional, community-based curriculum models (c.f. Sailor et al., 1988).

Ninety-four percent of the IEP objectives written for students in the full inclusion programs included an opportunity for social interaction with nondisabled peers. This represents a significantly higher level of interaction opportunities than IEP objectives written for special class elementary programs (46%) or special class high school programs (75%). Greater opportunity for social interaction within educational activities would be expected when students are full-time members of general education classrooms. (Insert Figure 1 here)

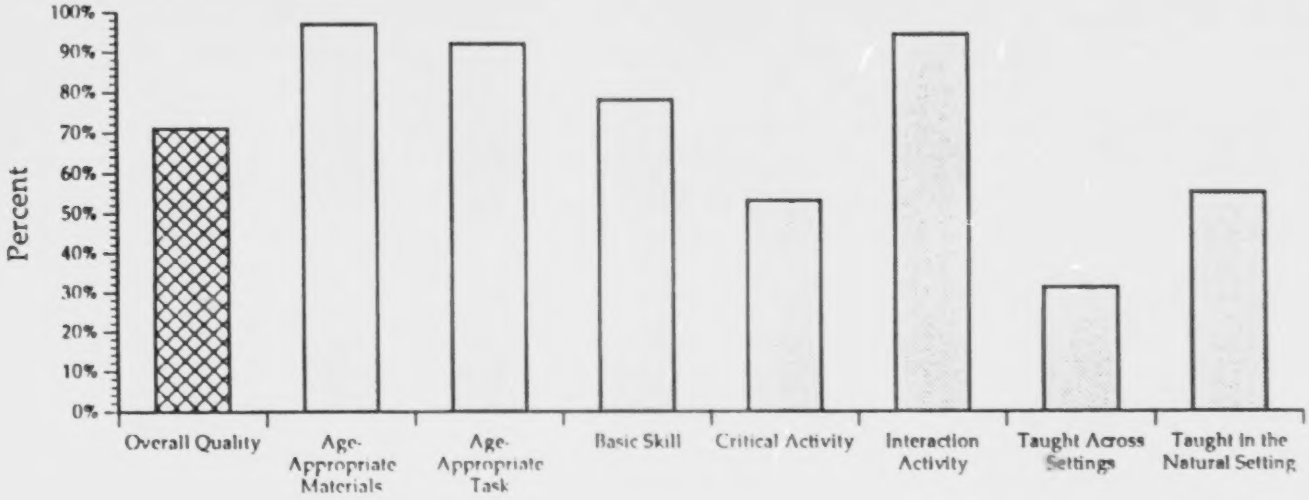
A substantially higher percentage of objectives written for the special class high school programs included the two quality indicators related to the promotion of generalized performance: that is, 71% of the objectives were taught across settings, and 96% of objectives were taught in natural settings. Only fifty-five percent of the objectives written for both full inclusion elementary and special class elementary programs were taught in the natural setting; and only 31% of objectives in full inclusion programs and 25% of objectives in elementary special class programs were taught across settings. Since multiple, natural environment instruction has been repeatedly identified as a key factor in the promotion of generalized performance of new skills (c.f., Sailor et al., 1988; Stokes & Baer, 1977), these trends should be flagged for further investigation in future program evaluation efforts. (See Table 7: Insert Here)

Integrated activities. A review of the weekly schedules of students in full inclusion programs revealed that, on the average, the students spent 94% of school hours per week in integrated environments (see Figure 2): 92% with nondisabled peers in school activities (including 74% of the time in general education classrooms) and 2% of the week in community environments with school and non-school peers.

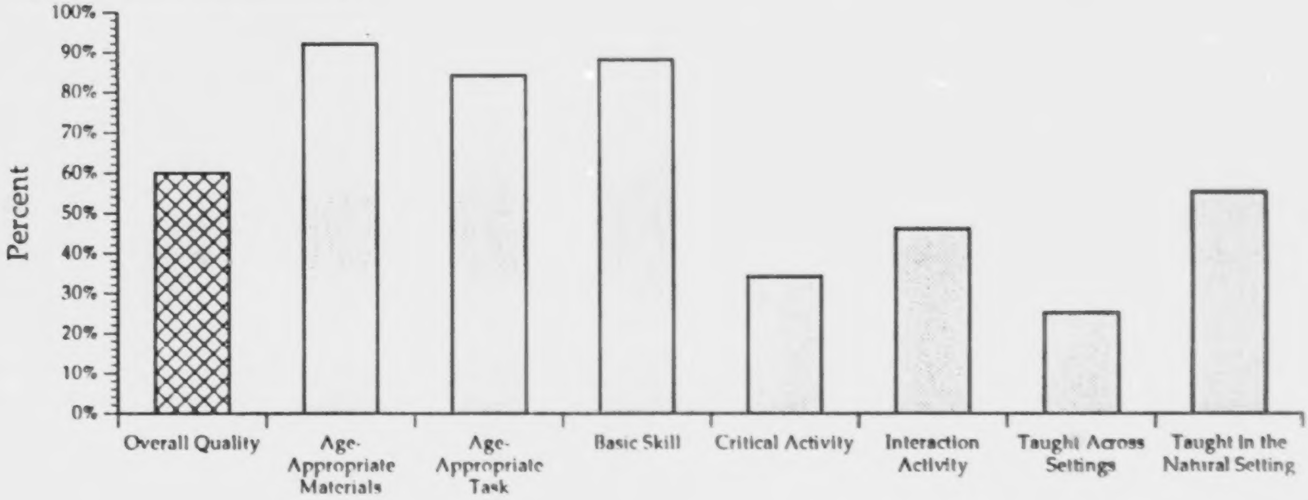
Students in special class elementary programs spent 78% of the school week in integrated community activities. Students were included in general education classroom activities 19% of the time per week. Students in the special class high school programs spent a similar number of hours per week in integrated environments (73%); however, there were fewer hours spent in integrated school activities and more hours spent with peers in community activities. These data suggest a need to consider new strategies for the ongoing, meaningful participation of nondisabled school peers within community instruction to ensure continuity of programming as well as meaningful interaction opportunities (cf., Ford & Davern, 1989). (Insert Figure 2 and Table 8 Here)

Figure 1 - IEP analysis by integration model

Full Inclusion (Elementary)



Special Class (Elementary)



Special Class (High School)

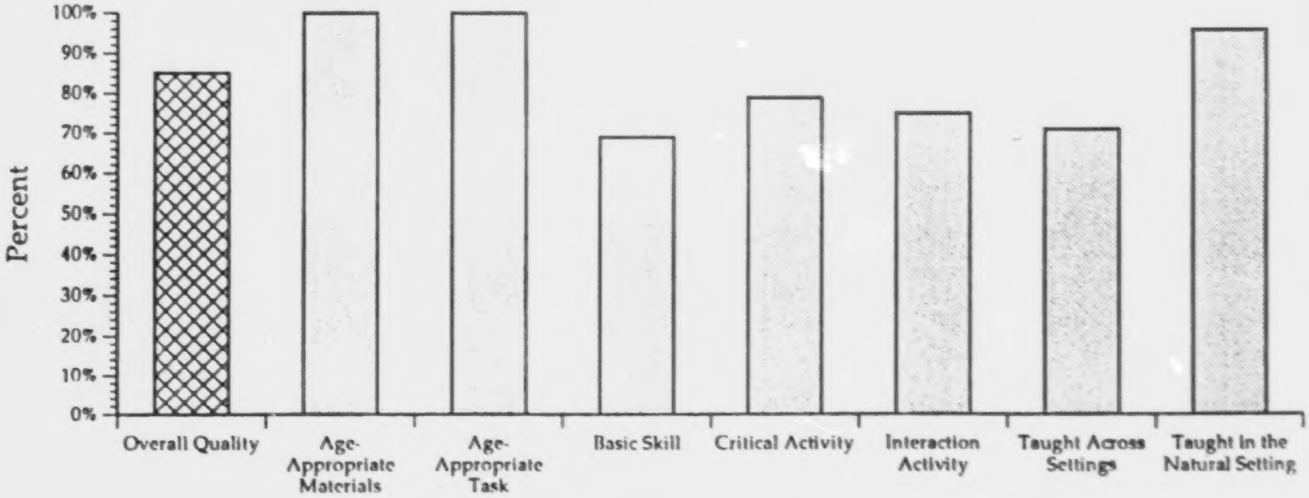


Table 7

IEP Analysis by Program

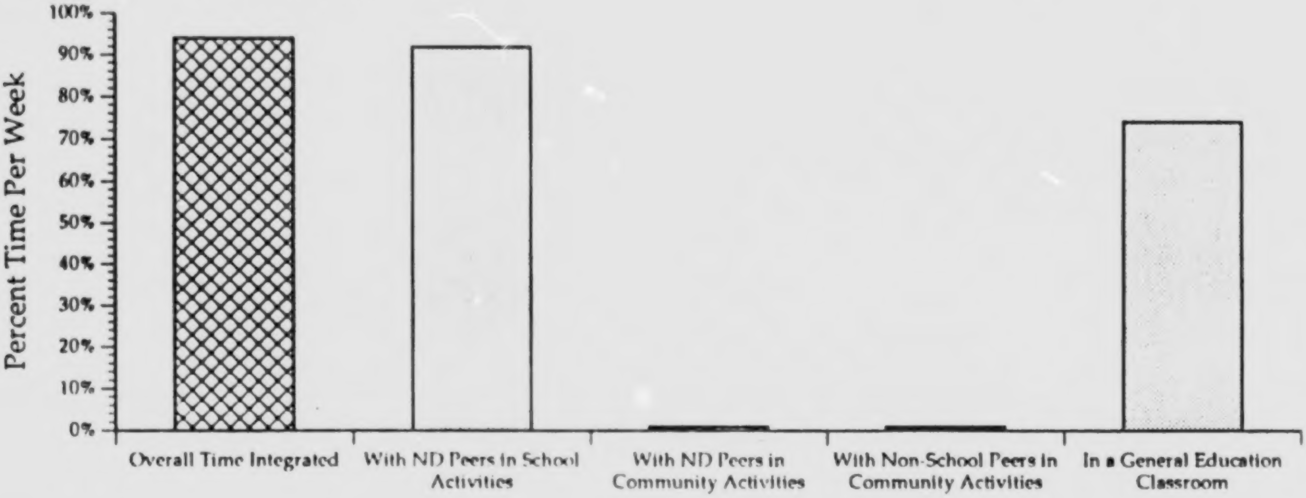
	FULL INCLUSION (ELEMENTARY)			SPECIAL CLASS (ELEMENTARY)		SPECIAL CLASS (HIGH SCHOOL)	
	Pr. 1	Pr. 2	Pr. 3	Pr. 4	Pr. 5	Pr. 6	Pr. 7
Overall IEP Quality:	64*	73	77	57	63	74	95
Individual Indicators:							
1) Age-appropriate materials	100**	92	100	92	92	100	100
2) Age-appropriate tasks	100	92	83	92	75	100	100
3) Basic skill	92	83	58	92	83	50	88
4) Critical activity	25	58	75	17	50	58	100
5) Interaction activity	100	100	83	42	50	50	100
6) Taught across settings	0	25	67	25	25	67	75
7) Taught in the natural setting	33	58	75	42	67	92	100

* % points obtained across objectives from total points possible.

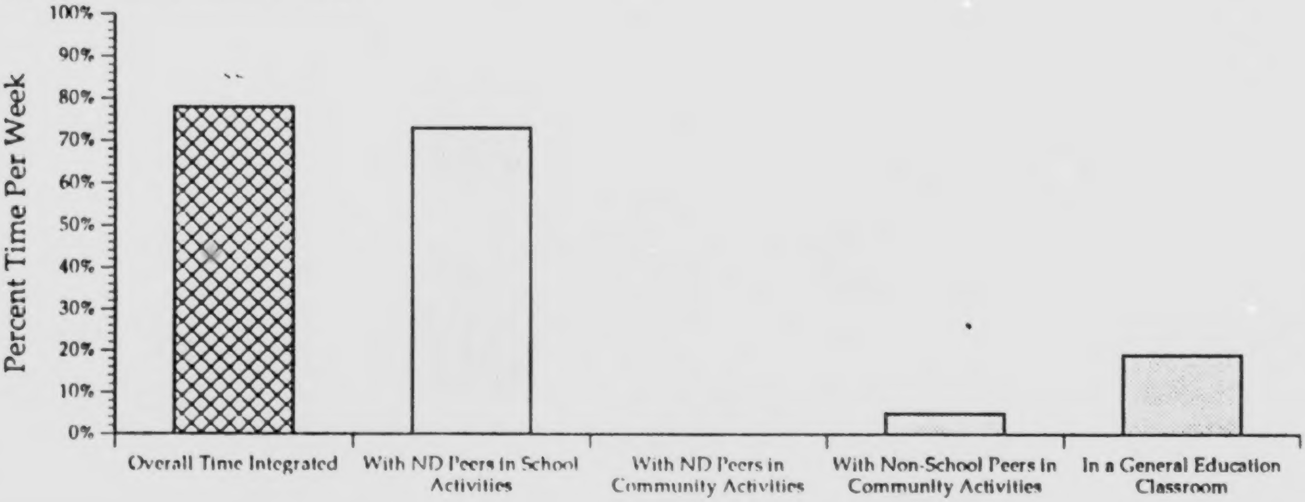
** % objectives including the targeted indicator.

Figure 2 - Integrated activities analysis by integration model

Full Inclusion (Elementary)



Special Class (Elementary)



Special Class (High School)

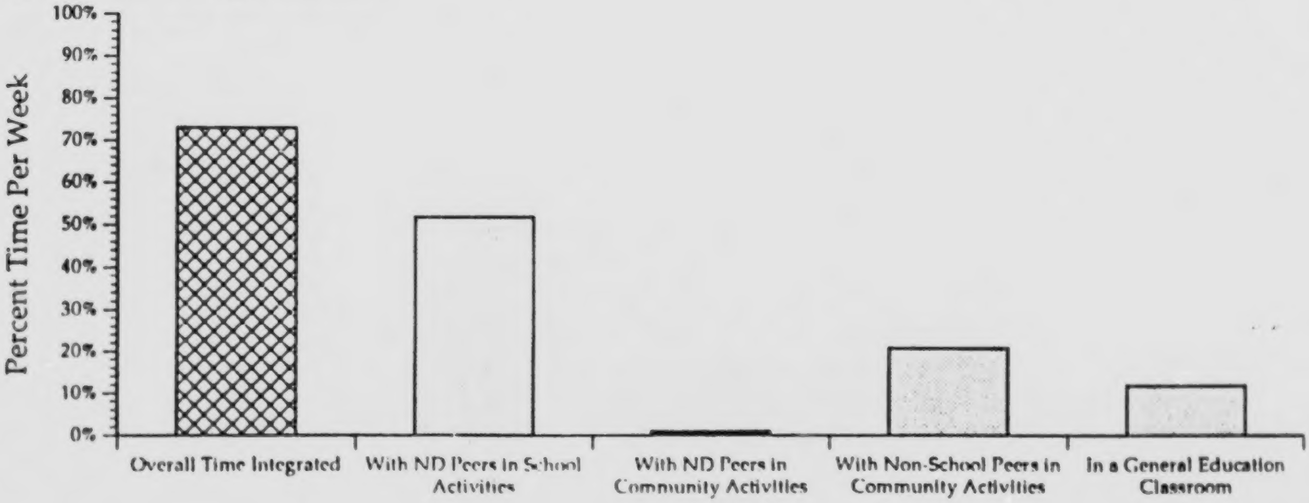


Table 8

Integrated Activities Analysis by Program

	FULL INCLUSION (ELEMENTARY)			SPECIAL CLASS (ELEMENTARY)		SPECIAL CLASS (HIGH SCHOOL)	
	Pr. 1	Pr. 2	Pr. 3	Pr. 4	Pr. 5	Pr. 6	Pr. 7
Overall time integrated	84*	100	98	70	86	68	77
With ND peers in school activities	81	100	96	66	80	51	52
With ND peers in community activities	0	0	2	0	0	0	3
With non-school peers in community activities	3	0	0	3	6	18	23
In a regular education classroom	67	80	76	38	0	12	12

* Percent time per week.

Extent and type of interactions with nondisabled peers. As is described in Figure 4, the percent of intervals in which a reciprocal interaction was recorded, using the EASI Social Interaction Scale, was almost identical across the three models with 47%, 47% and 45% for full inclusion, special class elementary, and special class high school programs, respectively. However, as the analysis was further refined to reflect the percent intervals of reciprocal interactions that were disabled student or "other" person initiated, differences between models emerged (see the second bar graph in Figure 3). A higher percent of interactions were initiated by the students with disabilities in the elementary special class program (35%). These outcomes may reflect the ability level of the students, with students who experience fewer, or less extensive disabling conditions initiating social interactions to a greater degree. The Student Descriptor Scale scores for the students in the elementary special programs were somewhat lower than the other two programs, thereby reflecting lower levels of disability.

(Insert Figure 3 and Table9 Here)

The number of reciprocal interactions initiated by "others" was substantially higher for the full inclusion elementary programs (72% than the special class elementary programs (56%). Furthermore, while the percent of intervals initiated by adults was very similar across the three integration models (see the third bar graph in Figure 3), there were substantial differences between the models in the number of interactions that were nondisabled peer-or disabled peer-initiated, and none were disabled peer initiated. The reverse is true of the elementary special class program: that is, only 1.5% of interactions were nondisabled peer initiated and 31% were disabled peer initiated. These data indicate that although students in special class programs at the elementary level spent the majority of their day in integrated settings (as is described in Figure 2), nondisabled peers in those environments were not initiating interactions with the students with disabilities. This may also be a function of the type of integrated settings and activities in which these students were engaged. For example, in Program 5 the primary "integrated" environment was the special class with nondisabled peers present. The analysis of the high school special class interaction patterns reveals an increase in nondisabled peer-initiated interactions to 20% of the observational intervals.

Figure 3 - Social interactions analysis by integration model

Reciprocal Interactions

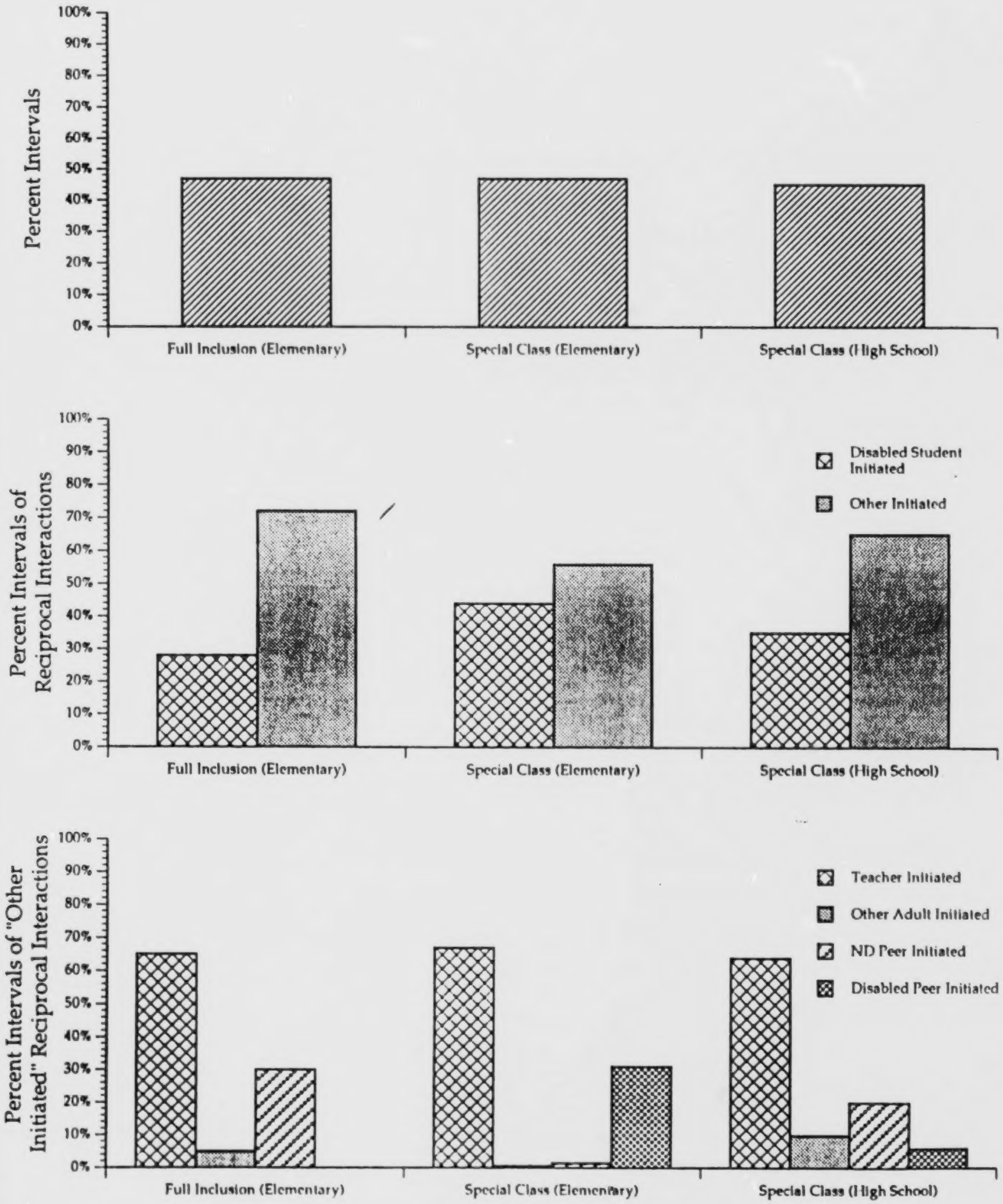


Table 9

Social Interactions Analysis by Program

	FULL INCLUSION (ELEMENTARY)			SPECIAL CLASS (ELEMENTARY)		SPECIAL CLASS (HIGH SCHOOL)	
	Pr. 1	Pr. 2	Pr. 3	Pr. 4	Pr. 5	Pr. 6	Pr. 7
Reciprocal interactions	39*	49	52	51	42	55	35
Disabled student initiated	41**	14	30	49	38	39	32
Other initiated	59	86	70	51	62	61	68
Teacher	54***	82	59	64	69	83	45
Other adult	15	0	0	0	1	11	8
ND peer	31	18	41	0	3	1	40
Disabled peer	0	0	0	36	27	4	8

* Percent intervals.

** Percent intervals in which reciprocal interactions occurred.

*** Percent intervals in which reciprocal interaction occurred that were "other initiated."

Future Research

The data generated by this preliminary program evaluation study represent only an initial attempt to identify the strengths and weaknesses of full inclusion and special class models of integration. Future research efforts are needed to not only investigate larger numbers of programs representing each integration model, but also to expand targeted student outcome measures. In addition to evaluations of IEP quality, social interactions, and integrated activities, analyses are needed of other key outcome variables including student progress on IEP objectives, parent and student satisfaction, the existance of social networks for the students with disabilities, and the extent to which students are actively engaged in the activities of the school day.

C4. Hunt, P., Farron-Davis, F., Staub, D., Beckstead, S., Curtis, D. & Goetz, L. (1992) Evaluating the effects of placement of students with severe disabilities in regular education versus special classes. San Francisco, CA: California Research Institute, Manuscript in submission.

In this comprehensive study by CRI during its fifth year, outcomes for students in inclusive and integrated sites were compared on several valuables. CRI utilized California programs for these comparisons, and 11 of the 16 programs (including all of the inclusive schools) were PEERS Implementation Sites in districts which had received direct PEERS services. Therefore, the outcomes of the study form a strong case for the positive effects of the PEERS Project. The results summarized by Pam Hunt, Principal Investigator for the study, are detailed below. These results were recently presented by Dr. Hunt at a public hearing of the state Senate Committee on Developmental Disabilities.

The study was designed to investigate the effects of the placement of students with severe disabilities in general education versus special education class. A number of key program quality and student outcome variables were measured and, except for an analysis of the IEPs of participating students, all measures were based on observations of students in their school programs. Sixteen elementary programs in California participated. Eight represented the "full inclusion" model of integration (i.e., the students with disabilities were full-time members of regular education classes) and eight represented the special class model. Each of the 16 participating programs was either an implementation site for the State Department of Education Inservice training or systems change projects or they were used by the teacher training programs at SFSU or CSU, Hayward, as practicum training sites and were considered to be "model" programs. This was done to established control of the crucial variables of teacher training, experience, and program quality.

Each of the participating programs was located on a regular education campus, and all of the students with disabilities participated in all general school activities (e.g., recess, lunch, assemblies, field trips). In addition, the eight full inclusion programs met the California Research Institute's criteria for fully inclusive educational programs.

- there was a natural proportion of students with severe disabilities a the school site and assigned to general education classrooms;
- primary membership for the student with disabilities was an age-appropriate general education classroom;
- no special education classroom existed, except as a place for integrated activities and available to a variety of educational support programs;
- the IEPs of the students with severe disabilities were written and implemented by both the general and special education teachers, and the ancillary staff;
- the students with disabilities received support within the general education program from special education staff; and
- students with disabilities attended the school that they would attend if nondisabled, or a school of choice within a reasonable transportation distance.

Two students were randomly selected from each of the 16 programs; but because the full inclusion model of integration may have a differential impact dependent upon the disability level of the student, all children in participating programs were assessed with select subscales of Bruininks et al. (1984) Scales of Independent Behavior: and then one participant from each classroom was selected from those students with less disability and one from those students with more severe disabilities.

What Did We Find?

The quality and curricular content of IEP objectives was evaluated using an instrument that we developed in 1986 for a study that analyzed differences in IEP objectives written for students in integrated versus segregated (development center) programs The instrument was known at that time to be both valid and reliable.

Each IEP was rated for "quality" in terms of the inclusion of seven best practice indicators in the areas of age-appropriateness, functionality, and potential for generalization to a variety of natural environments.

In addition, each IEP was rated for the curricular content of educational objectives. Curricular areas included communication, social, sensory-motor, vocational, domestic, community, recreation/leisure, and academic skills development.

The results of the analysis of the IEPs for the participating students are described below [Figure 4 and 5]. There are three bar graphs representing the outcomes for each of the quality and curricular content variables analyzed. The first graph described the outcomes for the students with "less disability" who attended general education versus special education programs. The second graph presents the outcomes for students with more disability; and the third graph presents the outcomes for students in each placement model, collapsing across level of disability. There are two bars representing the outcomes for each variable: the solid bar describes the outcomes for the full inclusion program and the striped bar represents the outcomes for the special class programs. Bars are starred to identify statistically significant differences between the integration models on a targeted variable.

[Insert Figures 4 & 5 about here]

For the students with "less disability" who were full-time members of general education classrooms, the analysis of the quality of their IEP objectives indicated that there were more basic skills objectives on their IEP (i.e., more communication, social,

Figure 4 - IEP Analysis Quality Indicators

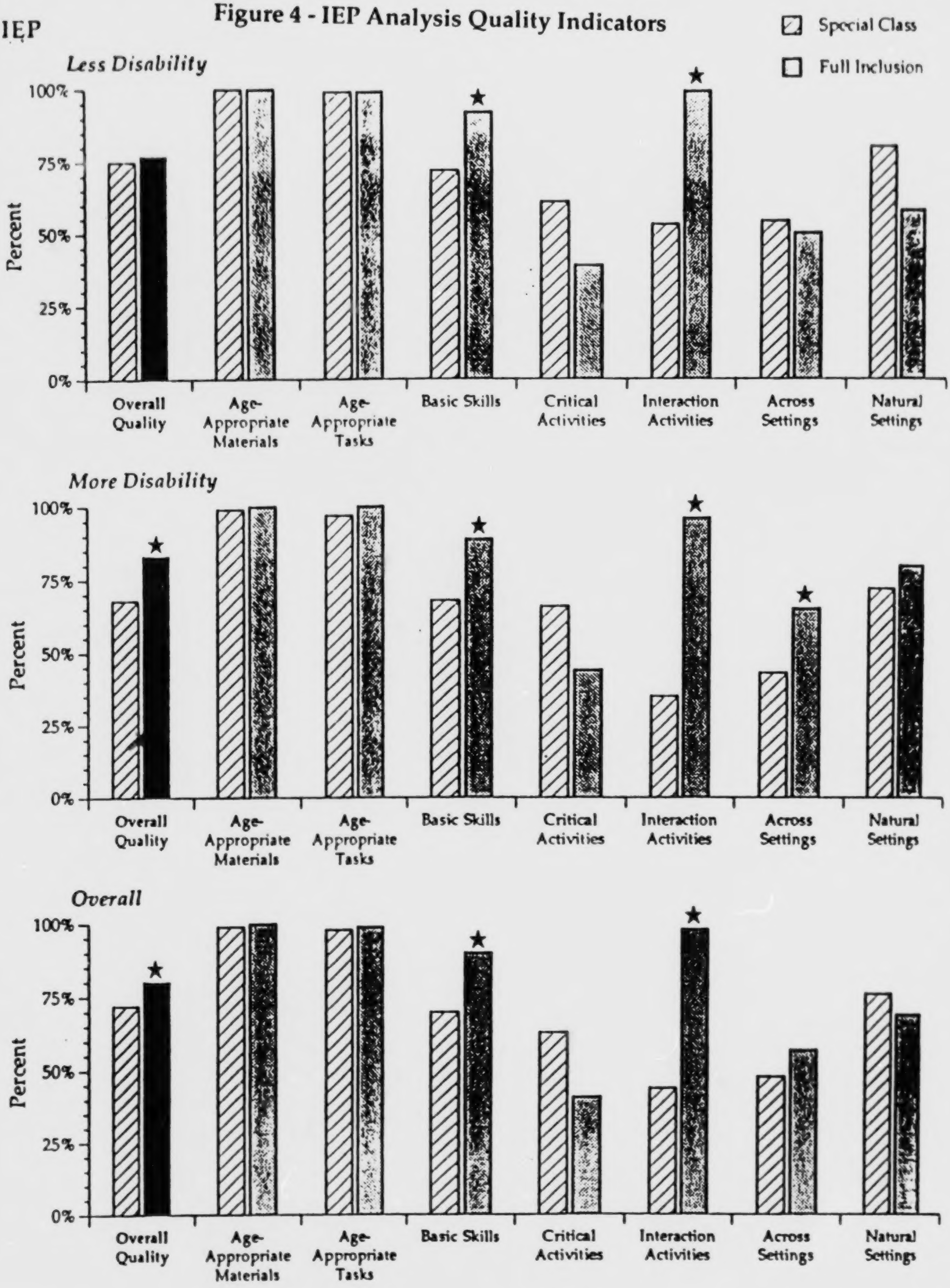
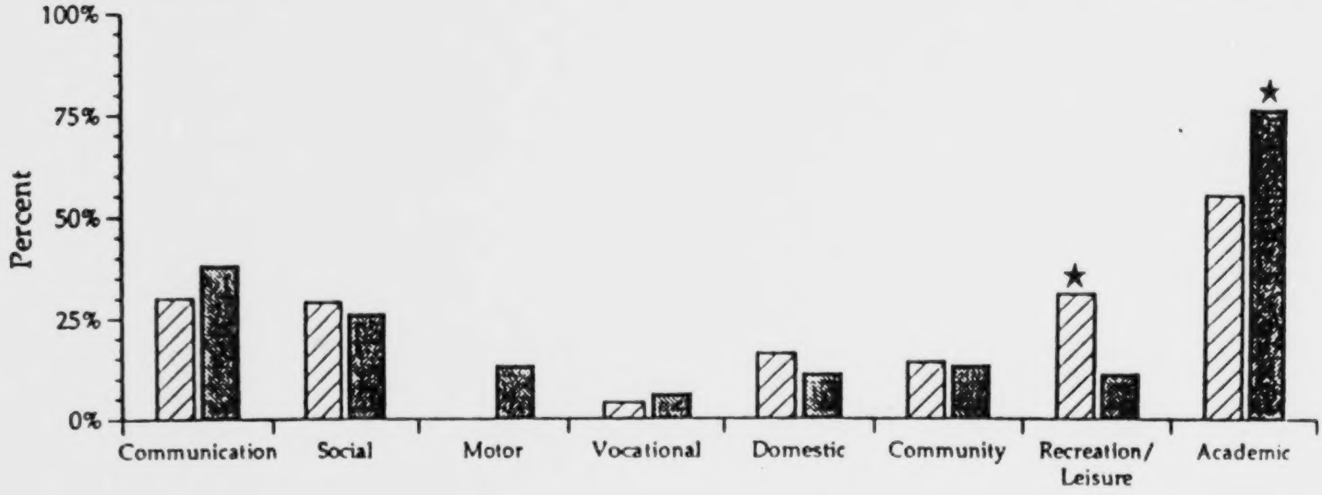


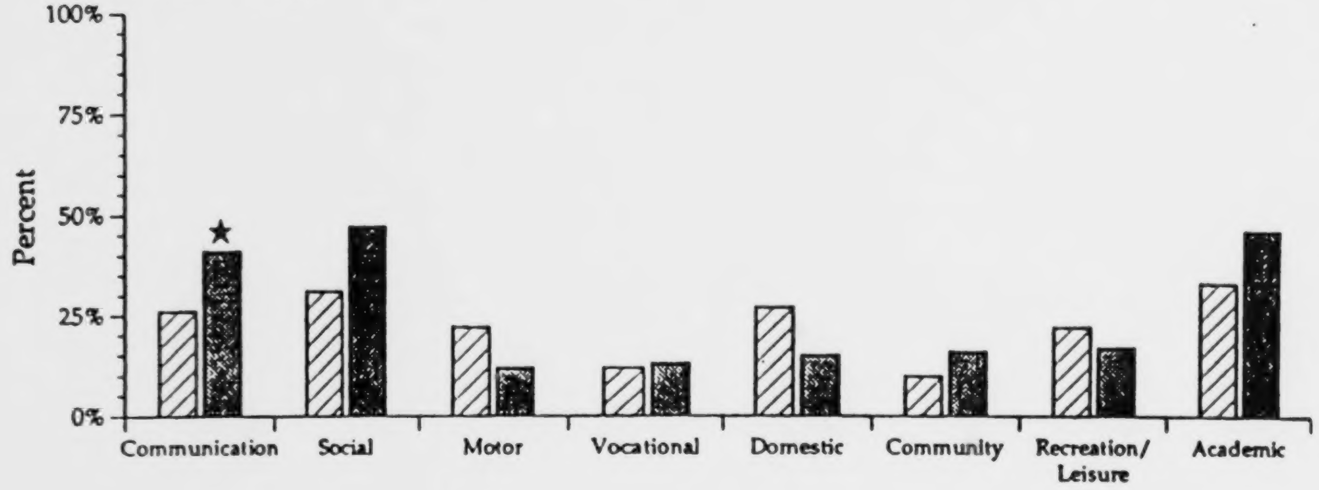
Figure 5 - IEP Analysis: Curriculum Content

▨ Special Class
▩ Full Inclusion

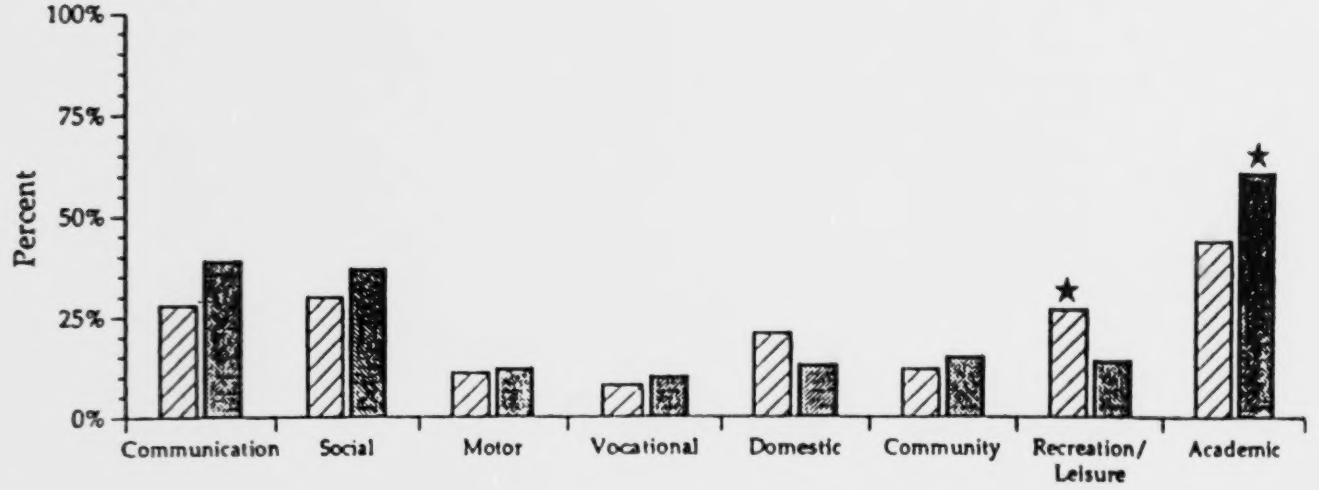
Less Disability



More Disability



Overall



motor, and/or academic objectives) and fewer (through not statistically significant) critical skills objectives (e.g., hand washing, eating, cleaning, grooming). In addition there were more objectives that included the participation of nondisabled peers, and fewer objectives taught in natural settings. The curricular content analysis indicated that the basic skills increase was do to some increase in communication skills development and a significant increase in academic skills instruction. The increase in academic skills development might account for the decrease in objectives taught in natural settings if much of the instruction was occurring in the general education classrooms. Finally, the increase in academic skills development was accompanied by a decrease in recreation/leisure activities.

For the students with "more disability" who were full-time members of general education classrooms, the analysis of the quality of their IEP objectives indicated a significant increase in overall quality; in the number of basic skills objectives (i.e., communication, social, motor, and/or academic objectives); in objectives that included nondisabled peers; and in objectives that were taught across settings. There was some decrease in critical skills objectives. The curricular content analysis indicated that the basic skills increase was do to a significant increase in communication skills development, and an increase (though not significant) in social and academic skills.

These outcomes suggest that there are shifts in the emphasis given to various curricular areas in full inclusion programs with more basic skills training (communication, social, and academic skills) and less critical life skills instruction. In addition, ,more educational objectives for students in general education programs are designed to include nondisabled peers.

The IEP is a written educational plan. The correspondence between written educational objectives and the activities of the school day and the child's level of engagement in those activities has never been clearly determined.

CRI developed an instrument to analyze the child's participation in the events of the school day. The instrument is disigned to measure the extent to which the child is:

a) actively engaged (e.g., motorically involved, communicating), passively engaged (e.g., listening, waiting for a turn), or not engaged;
b) alone or with a group (at least one other student); and
C) participating in either academic activities, basic skill or critical activities, free time, lunch or recess, and transition.

Data were collected approximately every 60 minutes for 5 observational periods, each of which lasted about 12 minutes

The results [Figure 6] for the students with "less disability" who were members of general education programs indicated that they were not more engaged in the activities of the school day than students who attended special class programs; however, they were more often participating in groups and were less often working alone. There were no significant differences in the general activity areas (i.e., academic, basic skill or critical activities, lunch/recess, or transition).

[Insert Figure 6 about here]

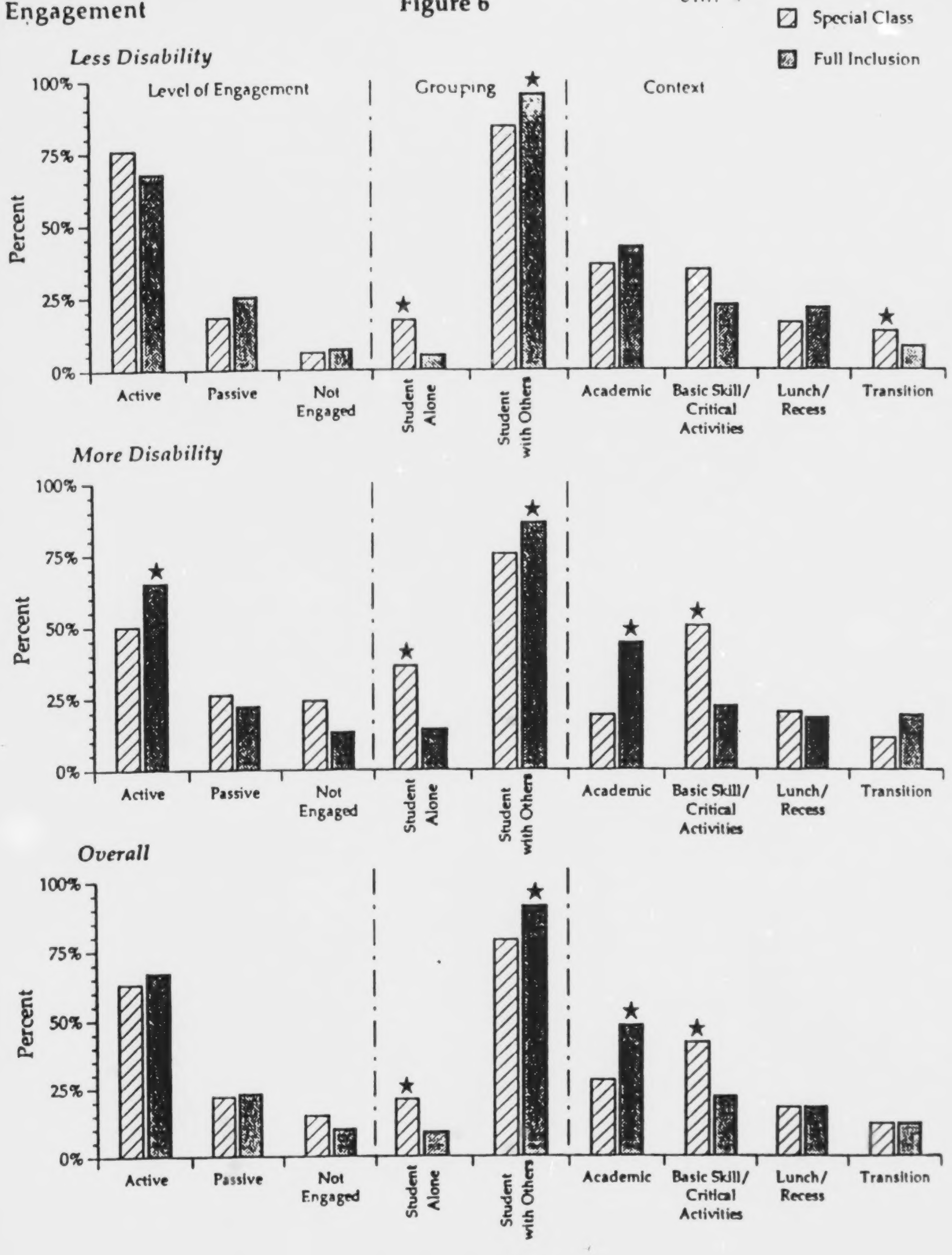
There were a number of significant differences identified for the students with "more severe disability". The students were more actively engaged in the activities of the school day if they were members of general education classrooms. In addition, students who were fully included were more often working in groups and less often working alone or with a paraprofessional. Finally, there was a significant increase in participation in academic activities and a significant decrease in participation in critical life skills activities or "pull-out" communication and motor skills activities.

These outcomes suggest that students with more severe disabilities are more actively engaged in the activities of the school day in full inclusion programs and are participating in more

Engagement

Figure 6

O.H. 4



academic activities. An yet, the educational objectives on their IEPs (as you recall) do not reflect a significant increase in academic objectives or a reduction in basic skills objectives--that is, communication, social, and sensory-motor skills.

A research question that should be of great importance to us then is whether or not students with more severe disabilities can develop the basic skills targeted on their IEPs in the midst of academic activity. That is, do academic activities in regular education classrooms provide the opportunity, support, and motivation necessary to learn basic communication, social, and sensory-motor skills.

In a study completed by CRI last year, three severely, multiply disabled second and their graders who were full-time members of three different elementary school classrooms acquired basic communication and motor objectives in the midst of cooperative learning math activities. In addition, the nondisabled members of their group facilitated the skill development of the child with disabilities with gradually fading assistance from an adult.

In addition--as a side issue--tests of achievement of targeted academic objectives by the nondisabled members of the groups that included Jessica and the other students with disabilities indicated that they learned as much math as members of a control group in the classroom that did not include a child with disabilities.

These results suggest that students can learn basic skills in the midst of academic activity--that, at least within the structure of cooperative learning groups, there is adequate opportunity, potential support, and motivation to learn. It is the challenge of educators who participate in, support and promote the full inclusion of students with severe disabilities in general education classrooms to contribute to the design of instructional contexts and processes that allow students with varying levels of skill development to participate successfully in the academic activities of the school day.

The degree to which students placed in special day classes or regular education classes were involved in integrated activities during the school week (i.e., activities that included the presence of nondisabled peers) was measured using an adapted version of the Schedule Analysis tool developed by Halvorsen, Beckstead, & Goetz, 1990. Data collection was implemented during an interview with each teacher. The schedules for the two participating students were analyzed with input from the teacher. From this recorded information, summary measures were developed of:

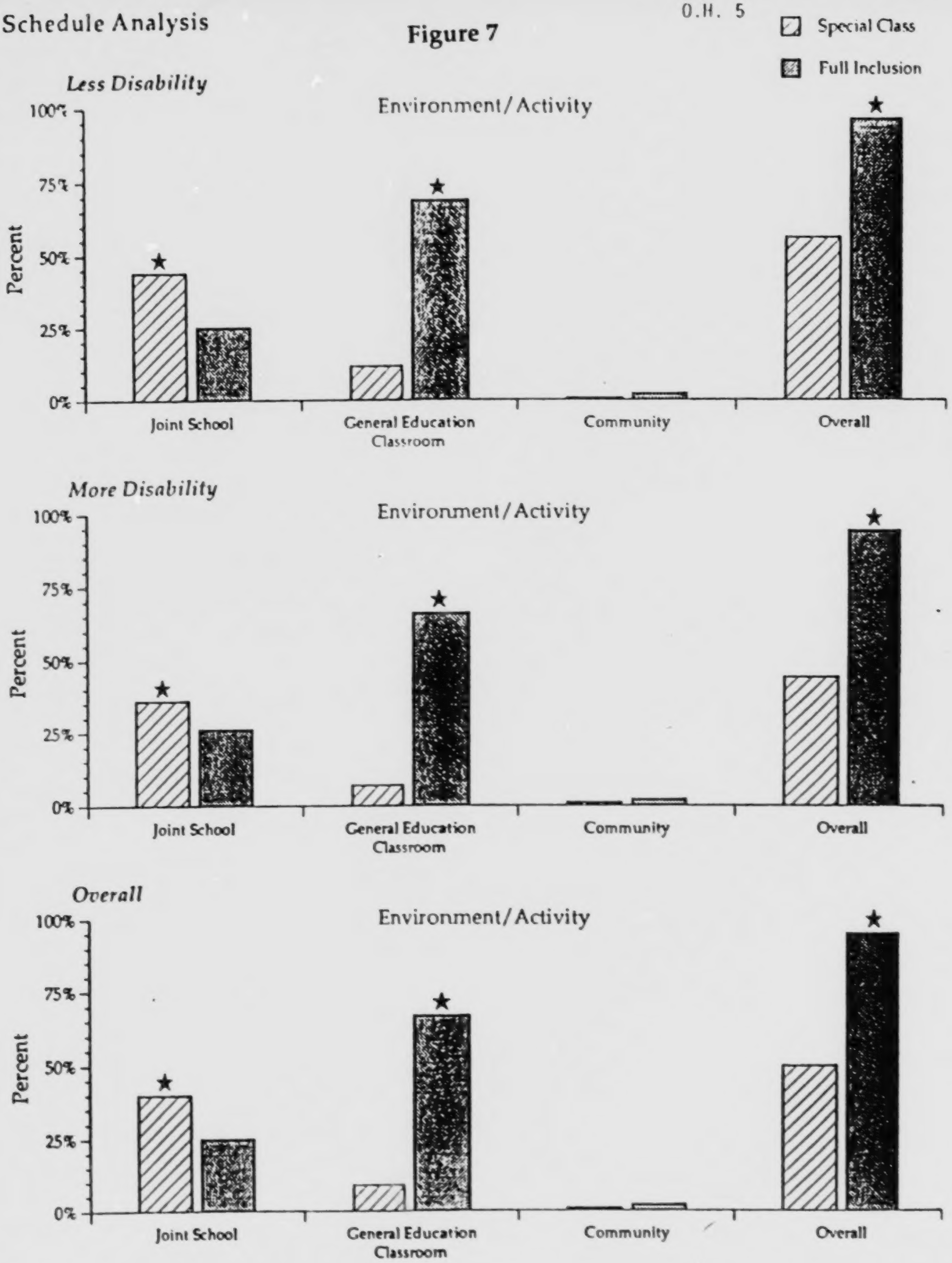
1) the amount of time the student spent with nondisabled peers each week;
2) the amount of time per week spent in regular education classrooms; and
3) the amount of time spent in integrated community environments.

The results [Figure 7] for both the participants with less disability and more disability indicate than, as would be expected, the students who were fully included spent the majority of their day in general education classrooms. On the other hand, students who attended special classes spent less that 10% of the day in general education classes. They were, however, spending significantly more time in joint school activities than the students who were members of general education classes. This outcome suggests that the special class teachers had identified school jobs and other general school activities to increase the amount of time the students are integrated with nondisabled peers.

The quality and quantity of social interactions between the participating students and others were measured using an instrument developed at CRI called the Educational Assessment of Social Interaction (Goetz, Haring, & Anderson, 1990 version). Data were collected during 12-minute observational periods that were conducted approximately every 60 minutes across the school day. During each observational interval, observers recorded communicative initiations from others to the student. Each initiation was described as being either social or task-related.

O.H. 5

Figure 7


Special Class
Full Inclusion
Less Disability
Environment/Activity
Percent
100%
75%
50%
25%
0%
★
Joint School
General Education Classroom
Community
Overall
More Disability
Environment/Activity
Percent
100%
75%
50%
25%
0%
Joint School
General Education Classroom
Community
Overall
Overall
Environment/Activity
Percent
100%
75%
50%
25%
0%
Joint School
General Education Classroom
Community
Overall

Reciprocal interactions were also identified in which there was both an initiation and a response--that is, a complete interaction.

For students with disabilities who were nonverbal, recorders looked for alternative forms of communication that included facial expressions, body movements, and the use of communication boards and books.

The results [Figure 8] for both the students with less disability and the students with more severe disability showed a significant increase in the reciprocal interactions between the students and nondisabled peers in full inclusion programs, and for the students with less disability, the interactions were more often social than task-related. There was no difference between the amount of reciprocal interactions with teachers in full inclusion versus special class programs; and, finally, there were very little reciprocal interactions between the participants and their disabled classmates in special class programs.

The results of this study suggest that there are important differences in the nature of educational programs for children with disabilities who are full-time members of general education classrooms; and there are significant differences in their level of engagement, inclusion, and social participation in the activities of the school day.

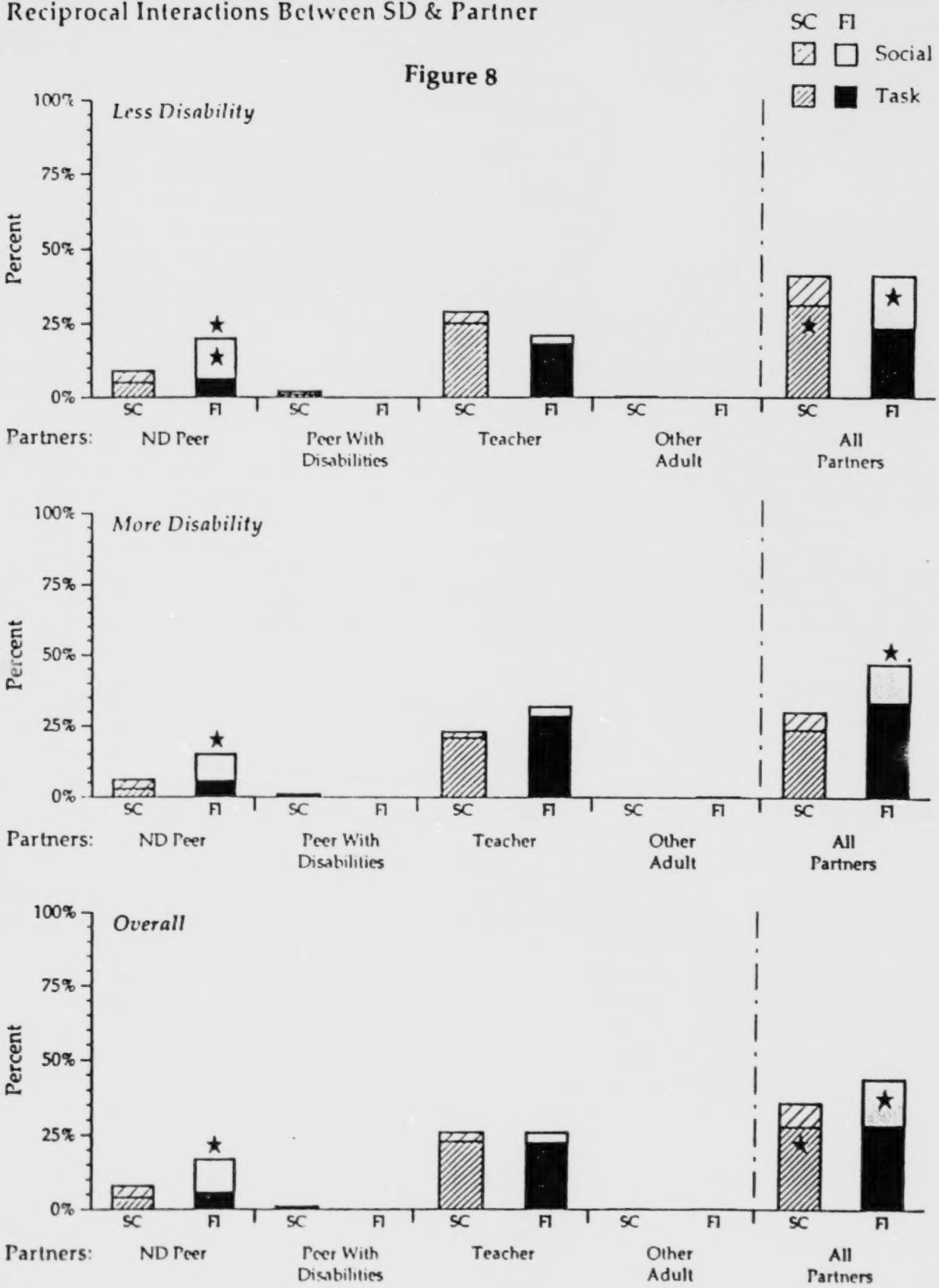
Of course, this study can only serve as a preliminary investigation of fully inclusive educational programs for students with severe disabilities. Further research is needed to include an expanded sample of programs and students and to further beginning investigations in the areas of:

- the level of attainment of IEP objectives by students with disabilities who are members of general education programs;
- the development of educational practices and adaptations to promote learning for all students in general education programs;

O.H. 6

Reciprocal Interactions Between SD & Partner

Figure 8



- the development of strategies to facilitate social relationships and friendships between the students with disabilities and their nondisabled classmates; and
- the effects that fully inclusive placement models are having on general education programs, students, and staff.

C5. Smith, G., Halvorsen, A. & Anderson, J. (1992). Principals' ownership of special education in full inclusion and special class programs. Hayward, CA: CSU Hayward Special Education Option and the PEERS Project. Masters thesis.

In this fifth-year study we utilized the 16 inclusive and integrated sites identified in the CRI study (Hunt et al, 1992) to examine principals' "ownership" across the two programmatic models. The hypothesis was that the principals in inclusive schools would demonstrate a higher level of ownership of those students and their program on a variety of indicators than would principals in sites with special class programs. Though an extensive literature review, ownership was identified as being composed of four areas: parent involvement, supervision practices, behavior management/discipline practices and contractual issues. A 65 question interview with yes/no responses was developed which asked first about the practice in terms of general educators, and later about the some practice in terms of special education teachers and related services personnel. Although there were no significant differences overall, the results are presented in detail in Appendix P.

D. Inservice/Preservice Training Data

1. Consumer satisfaction/utility of information data were collected on all workshop format training sessions over the five year period, and would be far too lengthy and cumbersome for presentation here. Much of this has been included in previous reports. Data presented here are from PEERS' final week-long statewide Innovation Institute on Inclusive Education (School Site Team Collaboration for Inclusion) conducted in June 1992 in Oxnard, CA. and attended by teams representing districts/SELPAS from six counties, as well as

data from the 1991 CDE statewide Fall Conference in Sacramento, CA.

(Insert Tables 10 and 11 about here)

These data indicate that trainings were very positively received, and - in the case of the institute, that participants felt an above-average level of confidence in their ability to utilize the newly acquired information.

D2. Additional impact beyond project participants

Table 12 lists 59 non-PEERS districts, SELPAS and County offices of education that participated directly in project inservice trainings, institutes, regional workshops and topical forums. In many cases these represent multiple districts, so that this list of 59 agencies actually represents more than 200 school districts. When these LEAS are combined with the 250 LEAS selected for ongoing PEERS' services statewide, 450 LEAS, or 43% of the states districts, were directly involved in PEERS activities.

In addition to LEAS, numerous state, regional and local organizations were direct beneficiaries of PEERS services. Table 13 lists organizations, universities, state agencies (within and outside California) parent organizations, advocacy groups and professional associations which a) received direct inservice training b) participated on the Advisory Board and/or c) participated on local integration support teams. Sixty-one organizations representing thousands in memberships are listed below.

IX. Project Impact

A. PEERS Products List

1. Neary, T., Halvorsen, A., Kronberg, R. & Kelly, D. (1992) Curriculum adaptations for inclusive classrooms. San Francisco, CA: San Francisco State University, CA Research Institute.

Table 10
1992 Evaluation Data
Special Education Innovation Institute
PEERS: School Site Team Collaboration for Inclusion

Oxnard, CA
Participants = 47
Evaluations Completed = 29
Average overall score = 4.50 (5 pt scale)

Items	1 very low	2 below average	3 average	4 above average	5 very high

Instructional Program

		Score
1.	Extent to which instructors knowledgeable about subject	4.85
2.	Extent to which instructors able to communicate subject content	4.6
3.	Extent to which instructors willing to adjust to meet participants' needs	4.1

Content

4.	Extent to which materials provided were of value to you	4.4
5.	Extent to which activities used were of value to you	4.37
6.	Extent to which instruction received was of value to you	4.68

Evaluation - Utility of Information

1.	Extent to which instruction has increased your knowledge of area	4.44
2.	Extent to which you feel knowledge will be useful to you	4.68
3.	Extent to which you feel capable of using this knowledge	4.14

General Evaluation

1.	Overall rating of course	4.65
2.	Overall rating of presenters	4.63

Table 11

1991 Special Education Fall Conference

Evauation Data: PEERS: Inclusive Education

		High			Low	
		4	3	2	1	
1.	Presenter prepared & knowledgeable	7	0	0	0	4.00
2.	Session content useful & timely	6	1	0	0	3.86
3.	Conducive for audience participation	5	2	0	0	3.71
4.	Information effectively presented	4	2	0	0	3.66
5.	Time used prudently	6	1	0	0	3.86

Tally Summary

5	Good presentation, ideas
1	Good presenter(s)
1	Works only in small district or limited basis
2	Needs more information, more specifics

77.77%	**Presenter(s) rated high**
66.66%	**Presentation rated high**

Table 12

X= multiple district consortia

Non-PEERS Districts and C.O.E.S Recipients of Direct Training 1987-1992 (Institutes, Workshops)

1. Huntington Beach
X 2. Orange County Office of Education (COE)
X 3. Santa Cruz county Office of Education (COE)
4. Elk Grove Unified School District (USD)
X 5. Tri Valley SELPA
6. Livermore USD
X 7. Stanislaus COE
8. San Francisco USD
X 9. Santa Clara SELPA I
X 10. Santa Clara SELPA II
X 11. Santa Clara SELPA VII
X 12. Santa Clara COE
X 13. San Bernadino COE
X 14. Placer/Nevada SELPA
X 15. Placer COE
16. Healdsburg
17. Pleasant Ridge
18. Liberty Union USD
19. EV SELPA
20. Santa Barbara COE
21. Contra Costa SELPA
22. Nevada H.S. District
23. Mt. Diablo USD
24. West End SELPA
25. Auburn Union School District
26. Ukiah USD
27. Mt. Pleasant USD
28. San Jose USD
29. Los Angeles USD
30. Ft. Bragg USD
31. Saddleback Valley USD
32. Fullerton USD
33. San Mateo Union High School District
34. Cabrillo USD
X 35. Lake COE
36. Chula Vista USD
37. Richmond USD
X 38. San Mateo COE
39. Redwood City USD
40. San Mateo USD
41. Santa Maria USD
42. Solana Beach USD
43. Fremont USD
X 44. Mendocino COE
45. Sacramento City Schools
46. Soquel USD
47. San Ramon USD
X 48. Contra CostaCOE
49. El Cajon USD
X 50. Fresno SELPA
51. Tehama COE
52. Covelo USD
X 53. Sacramento COE
X 54. El Dorado COE
X 55. Kings County
X 56. Tri County Consortium
57. Rio Linda USD
58. Folsom-Cordova
59. So Lake Tahoe

Table 13

Organizations, Universities and Other Agencies: Participants and Recipients of Direct Training

Universities: California

	California State University, Hayward -	Educational Administration Special Education Department
*	San Francisco State University.-	Educational Administration Special Education Department
*	San Diego State University -	Educational Administration Special Education Department
	CSU Sacramento -	Special Education and General Education
	CSU Long Beach -	Special Education and General Education
	Loyola University -	Special Education and General Education

* University of CA. Berkeley: Public Health
* CSUS Assistive Device Center
Solano Community College - Early Childhood Department

Professional Association

Council for Exceptional Children
* CA. Teachers Association
* CA. Federation of Teachers
CA. Association of Program Specialists
CA. Associtation of School Psychologists
* Association of CA. School Administrators
National School Boards Association
* CA. Assocation of Post-Secondary Special Educators (CAPSSE)
* Special Education Administrators of County Offices (SEACO)
PHI DELTA KAPPA
* SELPA Directors Association

Regional Agencies

Headstart
Regions J&L Staff Development
No. Bay Regional Center
Regional Center of the East Bay
East Bay Assoc. for Persons Labelled Severely Handicapped (EBASH)
Community Alliance for Special Education

Out of State Agencies

Hawaii Department of Education
Maryland Department of Education
Pennsylvania Department of Education
Texas Department of Education
University of New Orleans-Special Education
Research and Triangle Institute: Center on Integration Education (North Carolina)
UAP- New York Medical College

Statewide Advocacy, Consumer/Family, and Professional Associations

* CAL TASH
Suported Life Institute
* Integrated Resources
* CA. Research Institute/SFSU
Schools Are for All Kids Advisory Group
* Protection & Advocacy, Inc.
Disability Rights, Education & Defense Fund (DREDF)
* Ca. School Leadership Academy

Parent Organizations

San Francisco Association for Retarded Citizens
Parent Helping Parents
Support for Parents of Special Children
Down Syndrome League - East Bay Chapter
* Community Advisory councils for Special Education
Disability Services Matrix
Penninsula Association for Retarded Citizens

CA. Department of Education

California Deaf-Blind Services
Training & Resources for Curriculum & Community Instruction
* CDE Preschool Unit. Compliance Unit, Field Consultants
Special Education Innovation Institute
State LRE Task Force
* CDE Curriculum & Instruction (General Ed)

State Agencies

* CA. Department of Developmental Services (DDS)
* CA. Community Colleges
Area Bd IV, V, X Developmental Disabilities
* CA. Childrens' Services (Department of Health)
Child Development
* Senate Office of Research

2. Karasoff, T., Alwell, M. & Halvorsen, A. (1992) Systems change: A review of effective practices. San Francisco, CA: SFSU, California Research Institute.

3. Simon, M., Karasoff, T. & Smith A., with contributions from Halvorsen, A. & Neary T. (1992) Effective practices for inclusive programs: A technical assistance planning guide. San Francisco, CA: SFSU, California Research Institute.

4. Neary, T., Halvorsen, A., Gilbert, A. & Terry-Gage, S. (1992) School Site Team Collaboration for Inclusive Education: A Training Institute. Sacramento, CA: California Department of Education (CDE) PEERS Project.

5. Neary, T., Halvorsen, A. & Smithey, L. (1992) Guidelines for Inclusive Education/Supported Education. Sacramento, CA: CDE, PEERS Project. Also appears with PEERS permission in Sailor, W., Gee, K. & Karasoff, T. (1993) In M. Snell (Eds) Systematic instruction of students with severe disabilities. (4th ed.) Columbus, Ohio: Charles Merrill Publishing Co.

6. Halvorsen, A. & Sailor, W. (1990) Integration of students with severe and profound disabilities: A review of research. In R. Gaylord-Ross (Ed.) Issues and research in special education Vol 1. New York: Teachers College Press.

7. Hanline, M.F. & Halvorsen, A.T. (1989) Parent perceptions of the integration transition process. Exceptional Children, 55, (6), 487-492.

8. Halvorsen, A.T. (1989) The integration challenge. PRISE Reporter, Pennsylvania Resources and Information Center, 20.

9. Sailor, W., Anderson, J., Halvorsen, A., Doering, K., Filler, J. & Goetz, L. (1989) The comprehensive local school: Regular education for all students with disabilities. Baltimore, MD: Paul H. Brookes Publishing Co.

10. Halvorsen, A.T., Doering, K., Farron-Davis, F., Usilton, R. & Sailor, w. (1989) The role of parents and family members in planning severely disabled students' transitions from school. In G. Singer and L. Irvin (Eds.). Support for caregiving families (Chapter 8) Baltimore, MD: Paul H. Brookes Publishing.

11. Halvorsen, A.T., Neary, T. & Smithey, L. (1991) Implementation site criteria for full inclusion programs. Sacramento, CA: California Department of Education, PEERS Project.

12. Halvorsen, A.T., Smithey, L, Neary, T. & Gilbert, S. (1992) Integration/inclusion needs assessment (rev.ed.) Sacramento, CA: CDE, PEERS Project, and Hayward, CA: CSUH, PEERS Project.

13. Halvorsen, A.T. & Neary, T. (1992) Inclusive education sites sample. Hayward, CA: CSU Hayward, PEERS Project, and Sacramento, CA: CDE, PEERS Project.

14. Neary, T. & Halvorsen, A. (1992) Full inclusion sites. Sacramento, CA: CDE, PEERS Project and Hayward, CA: CSUH, PEERS Project.

15. PEERS Consultant Bank Resources for technical assistance on inclusion (1992) Hayward, CA: CSU Hayward, PEERS Project.

16. Halvorsen, A.T. (1992) Inclusive education: course syllabus. EPSY 6956. Hayward, CA: CSU Hayward, Special Education Option.

17. Neary, T. (1992) Education of exceptional children: Course syllabus: EDS100 Sacramento, CA: CSU Sacramento, Department of Special Education, Rehabilitation and Counseling.

IXB. Dissemination Activities

1. Conferences Presentations and Workshops

a. National Conferences

- The Association for Persons with Severe Handicaps (TASH) 1988, 89, 90, 91, 92 (750 attendees)
- The Council for Exceptional Children (CEC) 1989 (200 attendees)
- National School Boards Association December, 1991 (200)
- CA. Research Institute Topical Conferences Strategies 1988 (300)
  Systems change 1990 (100)
  Integrated Related Services & Inclusion 1991 (100)
  Restructuring & Inclusion 1992 (100)

b. Statewide Conferences

CAL-TASH 1988, 89, 90, 91, 92 (500)
Supported Life 1988-1992 (400)
Integrated Resources 1990-92 (300)
CA. Assoc. of Program Specialists 1989 (75)
Assoc. of CA. School Administrators 1990 (100)
CDE Annual Fall Conference 89-92 (200)
Full Inclusion Seminar 1991-1992 (400)
CA. Implementation Sites Conference 1988-1992 (350)
Special Ed Administrators from County Offices 1990, 1991 (175)
Special Education Innovation Institutes 1988, 1989, 1990, 1991, 1992 (250)
CDE Consultants Meetings (200)

Co sponsorship Of Schools Are For All Kids in CA 1989-1992 (300)

c. Regional Conferences/workshops

- Phi Delta Kappa 91, 92 (50)
- Collaboration conference, Sonoma (250)
- Back to School Conferences (600)
  Ventura C.O.E. San Diego
  Santa Clara SELPA III
  Solano C.O.E.

Oakland U.S.D.
Long Beach
Napa
MAC-SELPA

- Regions J&L Staff Development 1992 (150)

d. Out-of-state conferences
technical assistance

- Maryland SEA and Coalition for Integrated Education 1992 (200)
- Pennsylvania Department of Education & Systems Change 1991 (15)
- Hawaii Department of Education (100)
- Texas State Department of Education 1990 (200)

Total: 6265

2. Vehicles utilized for national and statewide product and media dissemination

- Special edge: CDE newsletter (Circulation 25,000) Five major articles publicizing LEA efforts in concert with PEERS 1988-1992 (125,000) Products and related materials available through R.I.S.E. also advertised here.
- Resources in Special Education (R.I.S.E.) CDE library and dissemination center state and nationwide for PEERS products.
- CA. Research Institute on Integration (CRI-SFSU) disseminated and seried of PEERS products and CRI-PEERS joint products continuously to CA. and the U.S. over the five year period including PEERS needs assessments, implementation site criteria, STRATEGIES modules and various chapters which PEERS staff co-authored. Will continue dissemination of PEERS-CRI joint products (see product list IXA. for at least one additional year.
- STRATEGIES newsletter (enclosure in TASH newsletter) Circulation of TASH - 8,000 members plus. PEERS distributed additional 500 copies to SELPAS, LEAS,

organizations in CA. Three articles by PEERS were published (25,000)

3. Local media: Articles about integrated and inclusive programs developed with PEERS were published in newspapers in Davis, Ventura, Oakland, Napa, Castro Valley (25,000 minimum)

   Total: 175,000

C. Publications:
See Products List, IXA, and Dissemination, IXB.

D. Implications and other Indications of Effect

1. Documented requests for information:
Throughout the life of the project, staff of the three regional offices and the CDE documented an average of 8 calls per week for information/assistance/products from parents, educators, advocates, legislators, related organizations, SEAS from other states, universities, systems change and demonstration projects, and other nations for a total of at least 2000 requests that were responded to over the five year period, outside of PEERS participating LEAS and SELPAS.

2. Use of materials: The project has documented PEERS Project materials use both in research and programmatic efforts throughout the state and U.S. For example, the PEERS application procedure has been adapted and/or utilized in several states (Virginia, Pennsylvania, Kansas); the PEERS Implementation Site Criteria have been used for research purposes by CRI, by Indiana State University and by Rutgers University researchers, and are currently in use for a comprehensive study by the CDE in California, to identify statewide model sites for LRE as mandated by SB806 in 1992. The joint manuals produced by CRI and PEERS (see product list) on systems change and curricular adaptations have been widely disseminated nationwide and are in their third printing by CRI, with continuous requests.

3. Pupil Count Procedures

Until 1987 and PEERS involvement, the CDE questions regarding LRE were unclear, and yielded questionable results. At on time in the late 1980's, California was rated highly on LRE in a report to Congress as a result of confusion over the category of "special day class". SELPAS then reported students within these classes without attention to whether these "SDC'S" were located in regular schools or in special centers. The Management Information System (MIS) piloted with LEAS and SELPAS in the late 1980's, and implemented statewide as of 1993, is an individual student-based system which can yield a much higher degree of accuracy. However, the original data field addressing segregation ("is this an isolated site?") contained such a pesorative description of the "isolated site" that some were not reported if there was any contact with nondisabled students. This has been changed so that all centers or separate, special wings of schools should be reported. In addition a data field asking the percent time in regular education is now being reported for all students receiving special education services, and California will have these data statewide, by federal categories, in 1993.

4. Coordinated Compliance Review (CCR)

The CCR process has been revised as well, to reflect quality indicators of LRE. For example, for item S.5B. "Steps are taken to ensure that individuals with exceptional needs participate in academic, nonacademic and extra curricular services and activities to promote maximum interaction with the general school population", 11 indicators are listed, such as: transportation accessibility, presence of interpreters, transcribers, notetakers for low incidence populations, positive attitudes and awareness of special needs, adaptations to ensure activity access, specialized equipment materials and services in regular classrooms, written documentation on IEP of rationale for placement in other than regular class, services/placement close to student's home, and specific policies and procedures in the local plan, as well as knowledge of State Board Policy on LRE. The presence of these indicators is to be determined through observation, interviews with staff and parents and document review.

5. Least Restrictive Environment (LRE) TASK Force, Reports and Strategic Plan Components Peers staff worked with the CDE statewide LRE Task Forces I and II from the inception in 1987 through 1992. The first task force, described in earlier reports/proposals, identified specific barriers to LRE across several areas (e.g., related services, fiscal model, transportation) and made recommendations for change to the CDE in each area, many of which were adopted by the CDE through staff development and policy units, and/or are currently under study, as with the fiscal model. The second LRE Task Force (1990-1992) was charged with assisting the CDE in implementing the CAI Strategic Plan for Special Education, in the LRE area, one of 11 areas targeted for change. The Task Force assisted in development of a videotape demonstrating inclusive education, and has made specific recommendations regarding the need for resources and technical assistance to LEAS and SELPAS, to implement LRE statewide with particular attention to students with severe disabilities, and has identified resources (e.g., PEERS products) to assist in the process. The task force has also recommended development of a CDE Program Advisory (i.e., policy interpretation) on Inclusive Education, discussed below.

6. CDE Program Advisory on Inclusive Education. The first draft of this advisory was developed shortly after the PEERs Project ended (March, 1993) and is being reviewed by former PEERS staff, IHE representatives, and legal advocacy groups. It is expected to be revised and released by June, 1992. This Advisory will have a significant impact statewide, as districts and SELPAS have been looking to the CDE for guidance and support in this area, and parents in particular have been requesting clarification as to their rights in requesting an inclusive education for their children in home or magnet schools. A specific case is which PEERS with the CDE provided testimony regarding inclusive education has heightened awareness statewide of the issues surrounding inclusion, and the need for a CDE leadership role. The case, decided in favor of the plaintiff, Rachel Holland in federal district court in

December, 1991, has been appealed by the district, Sacramento City to the United States Court of Appeals. Further discussion of the case is detailed below; and demonstrates the state's movement on this issue.

7. Sacramento City U.S.D. vs. Rachel Holland, and the California Department of Education (Case No. 92-15608, 786 F. Supp. 874, E.D. CA. 1992). As noted both in the judge's decision in this case, and in the CDE Program Advisory draft on full inclusion, the judge gave great weight to the testimony of Tom Neary of the PEERS Project in concluding that the district "had not substantiated its claim that the costs of educating Rachel Holland in a regular classroom would be significantly more than the costs of the districts proposed placement." He considered four fundamental factors in his deliberations: 1) educational benefit to Rachel, with supporting aids and services in a regular class as opposed to a special class, 2) nonacademic benefits to Rachel from interaction with nondisabled students, 3) the effects of Rachel's presence on the teacher and other students in the regular class and 4) costs of supplementary aids and services necessary to support Rachel in the regular class. The case has taken on national significance as the family has prevailed both in administrative hearing and in court, and increasing numbers of districts have begun to develop inclusive options partially in response to the decision, as evidenced by continuing requests for assistance. The Director of Special Education for the district has been replaced, and there is some hope that the current administration will elect to settle rather than pursue the case, although the ultimate outcome is unknown at this time. The current director, Dr. Lou Barber, former state Director of Special Education, has requested and received information and consultation from former PEERS staff regarding full inclusion.

8. Waiver requests. PEERs received frequent requests for information and assistance in obtaining waivers of the Education Code (discussed under VII., Methodological and Logistical Problems) to enable LEAS/SELPAS to implement inclusive education utilizing the special day class unit of

funding. Each PEERS' SELPA where inclusion is in effect has filed for/obtained these waivers, and the CDE has reported a significant increase in these waiver requests, which are made to the State Board of Education. This is itself demonstrates an increase in inclusive option development, and in SELPAS following appropriate procedures for implementation. A sample waiver request from a PEERS SELPA can be found in Appendix K.

9. PEERS II: California Outreach Project PEERS staff, with the CDE, competed successfully for one of the three OSEP Outreach grants awarded in October 1992 (H086U20023). This three year project, which is a northern California effort, is working at the district and school site level to develop and replicate inclusive education in eight LEAS, with development of "tech centers" (schools and training teams) within each LEA, which will be utilized both within and across districts for training, technical assistance, and dissemination (replication). In addition the project has several continuing systems change objectives at the state level, working with the management team and various program units to facilitate spread of effect, and coordinate efforts with restructuring/reform. PEERS II is tied in as well with two IHES, CSU Hayward and CSU Sacramento, as was the first PEERS Project. PEERS II - Outreach will provide a vehicle for ongoing dissemination of PEERS products and materials statewide, and linkage among PEERS I and II LEAS. This will assist the state in facilitating ongoing technical assistance to districts developing inclusive education option.

IXE. Component I SELPA and District Services

A. Year 05 SELPAs/Districts (LEAs)

1. North Central Region

(a) **Shasta County SELPA**, a consortia of twenty eight districts and the Shasta County Office of Education serves approximately 125 students with severe disabilities throughout the county on a variety of integrated and segregated sites. Shasta County Office, the primary provider of services, utilizes rented space on district school sites and the Monte Vista Special Center to provide instructional services. These county operated programs have been providing community based instruction for a number of years and more recently, have developed classrooms on regular high school, middle school and elementary school sites throughout the county, including a very innovative community college site. The county is mainly rural, with Redding, the principal population area, a suburban location. Shasta County was selected during the last year of the project to assist them in a county-wide restructuring effort initiated by the county superintendent. Planning and inservice activities took place between November of 1991 and May of 1992 including:

1) Development of an Integration Support Team consisting of representatives of many of the participating districts, parents, Board of Education representative, district and county office administrators, general and special educators, related services staff, county Mental Health and Far Northern Regional center staff. The transportation manager was also involved on an ad hoc basis. Meetings were held monthly with subcommittees for inservice, team building, curriculum, facilities and transportation.

2) Completion of a comprehensive needs assessment of the current status of integration in the county and a determination of future needs.

3) Visitations to inclusive school sites in Colusa County were made by committee members to examine this as an option.

4) Coordination of this Integration Support Team with the County Superintendent's Shasta 2000 plan.

5) Development of a SELPA mission statement for services in the Shasta County SELPA.

6) Presentation on SELPA wide full inclusion with services provided by the county office by Colusa County SELPA Director.

7) Presentation on full inclusion by a parent to the Integration Support Team.

8) Development of eight SELPA objectives with designated actions and timelines including inservice training; establishing specialized health care committees and procedures; creation of PEERS (Shasta PEERS) to continue support for integration and to monitor the integration plan; transition of remaining students from the special center; evaluation of integration SELPA wide and determination of the use of the center space.

Outcomes in the SELPA include:

1) Transition of all except nine students from the special center site to regular age-appropriate school campuses. The last class is being dispersed to age-appropriate regular school sites by September, 1993. Three classes have been transitioned to regular school sites, involving 20 students.

2) Establishment of a High School age apartment program for four students to support transition to employment and community participation.

3) Establishment of one non-categorical program in which students attend school in their own region of the county.

4) Transition of ten students to Junction Elementary school.

5) The special center (Monte Vista) is transitioning to become a center for children birth to five with 2 state pre-schools and 1 early intervention program.

B. Years 01-04 SELPAs

1. North Central Area

a. San Juan Unified School District is a single district SELPA for the 47,000 K-12 general education students enrolled. The district serves approximately 5000 students with special needs, including approximately 500 students with moderate to severe disabilities. Historically, students with severe disabilities have been served on two special centers, however over the years, the district has established several Independent Living Skills (ILS) classes on regular school sites. These school sites are not necessarily the students' home schools. San Juan USD requested assistance from the PEERS Project to reduce the numbers of students served on isolated sites, to develop a board approved policy statement on LRE, to develop a housing plan for LRE, to generate and implement a plan for inservice training for both general and special educators and to develop strategies for adapting curriculum.

A number of activities took place during the project period including:

1) Formation of an Integration Support Team involving parents, administrators and teachers from both general and special education, community service agencies, parents, a school board member, a nurse and a representative from California Children's Services. A Special Education Consultant from the California Department of Education participated in initial meetings. Three committees were established through this Integration Support Team including the Service Delivery Committee which considered implications of providing quality service in a dispersed model; the Facilities Committee, which dealt with space issues and developing "feeder" patterns; and the Inservice Committee, which developed an inservice plan for all constituencies impacted by change. A comprehensive needs assessment was completed by support team members regarding the current status of integration and integration best practices in the district.

2) Visits to model demonstration sites in Yolo County and Colusa County by support team members.

3) Presentations to support team members by school site administrators, parents and project staff on inclusive schools, strategies for integration and planning for integration.

4) Presentations to district general education staff at targeted schools regarding integration.

5) Presentations to general education students at targeted schools.

6) Presentations and information meetings for parents and special education staff at special centers regarding the project and integration and to the SELPA Community Advisory Committee.

7) Development of a comprehensive integration plan entitled, "PEERS: Project Integration Support Team Report and Recommendations" outlining the district's mission and plan for integration.

8) Participation by district staff in the PEERS "School Site Team for Inclusive Education" training institute and by two district site principals in the Schools Are For All Kids (SAFAK) training.

Outcomes for this district include:

1) Six classes have moved to age-appropriate general education school sites, involving 75 students.

2) The establishment of two full inclusion sites at Trajan Elementary and Coyle Elementary with plans for establishing a third site at Cameron Ranch Elementary in September, 1993. Currently, 15 students are currently involved in full inclusion in the district.

3) Development of a district integration procedures manual outlining specific steps in transitioning students to integrated sites.

4) Linkage through project staff to business consultants in Total Quality Management which has developed into a "Future Search" conference tied into San Juan 2000.

b. Yolo County SELPA, a consortia of five school districts and a county office serving approximately 22,300 general education and approximately 2300 special education students of which approximately 230 are students with severe disabilities,participated during the second project period. Students with severe disabilities from each of the five districts have historically attended a special center in one of the districts, necessitating extended bus rides from one town to another. At the initiation of the project, students with severe disabilities were served only at the special center in Woodland. While districts operated programs for students with learning disabilities, those with more severe disabilities were served by the Yolo County Superintendent of Schools at the center. In requesting PEERS services Yolo County SELPA expected assistance in planning, training and implementing least restrictive environment in the SELPA and expressed the hope that the majority of classes now located at the isolated site would be relocated. One of the major factors in selecting the SELPA was the strong support from parents in one of the districts in developing integrated options in their home schools. A wide range of activities occurred over the course of the project's involvement with Yolo County SELPA including:

1) The formation of the CHEERS committee, (Children Having Equal Educational Rights), a SELPA Integration Support team, consisting of representatives from each of the participating districts and the county office and involving all district Directors of Special Education, the SELPA administrator, the county Director of Special Education, parents, general and

special education teachers, related service staff, community service agencies, a district board member, California Children's Services and a Special Education Consultant from the California Department of Education. The Integration Support Team, through three committees inservice, delivery of related services and service options- completed a comprehensive needs assessment on integration and worked to create a comprehensive plan for creating new integrated options in Yolo County.

2) Presentations to all district boards of education and the county schools board of education regarding integration and the project goals and strategies.

3) Presentations to district leadership meetings regarding the project and integration.

4) Meetings with families of students with severe disabilities in each district regarding the project and integration.

5) Visitations by county special education staff to model demonstration sites.

6) Participation by staff from one district to a Strategies Conference provided by PEERS.

7) Inservice training by project staff to special education staff in the county program and to district staff in targeted school sites.

8) Sponsoring Yolo County staff at a full inclusion institute.

Outcomes in this SELPA include:

1) Development of an integration plan including site, staff, family and student preparation.

2) Development of training modules for general educators, special educators, administrators and parents regarding integration.

3) Training for district and county staff in Project LEAD, an ability awareness training program.

4) The transitioning of 5 special day classes to regular education school sites and involving 48 students.

5) The development of a full inclusion program in Davis Joint USD involving 10 students who attend school in three home schools. One teacher and two instructional assistants serve these students in general education classrooms for the total day.

6) Numerous presentations at national, state and local conferences regarding the full inclusion program.

7) Establishment of the full inclusion program as a state model implementation site in California Implementation Sites with visitors from Europe and Guam as well as from numerous other states and California school districts.

c. **Lassen County SELPA** consists of 10 districts and the Lassen County Superintendent of Schools which serve approximately 5,125 students, 500 of whom receive special education services and approximately 45 of which are labeled severely handicapped. Because Lassen County in a rural area with severe winter conditions, the SELPA has had to be creative in how it provides services. Many of the students with special needs have been served on regular school sites, however at the initiation of the project, some were served in a separate building located on the distant edge of an elementary campus. Some of the students served there were long past elementary age. The SELPA's goals in requesting PEERS services were to support the integration of students onto regular campuses by providing inservice training to all constituencies; to develop a program on a high school site and to develop appropriate curriculum for students at the high school level. Due to the distance of this SELPA, and the sparsity of population, the project worked on a technical assistance basis with the SELPA. However, a number of activities occurred to support the SELPA including:

1) Creation of a representative SELPA Integration Support Team to complete a SELPA wide needs assessment and to develop a plan for integration.

2) Informational meetings with the Lassen County Board of Education and the SELPA Community Advisory Committee regarding integration rationale and strategies.

3) Workshops in Lassen County regarding integration and non-aversive behavior change for county schools staff.

4) Visitations to model demonstration sites by special education staff.

5) Sponsoring of Lassen County staff to full inclusion institute at Lake Tahoe which resulted in establishing a full inclusion program at McKinley school.

Outcomes for this SELPA include:

1) Establishment of a full inclusion program supporting 22 students at McKinley school in a non-categorical approach.
2) Movement of high school students from the elementary campus to a community based program with functional skills training.

3) Participation of students previously served in the isolated building in general education classrooms at the elementary school.

d. Colusa County SELPA involves four school districts and the County Superintendent of Schools. Colusa County is a very rural area, serving 3620 general education students, approximately 20 of whom have severe disabilities. Prior to 1987, Colusa County sent students with severe disabilities out of county to be served due to the sparsity of population. As students were returned to the county, the SELPA director was determined to create placement options only on integrated . Colusa County, in requesting services from the PEERS Project asked for assistance in bringing back students in a manner beneficial to students, parents and the school community. Multiple activities occurred in Colusa County over the course of the project including:

1) Establishment of a representative Integration Support Team involving special and general education administrators and teachers, parents, a district board member, a representative from California Children's Services, a school nurse, and community agency representatives.

2) Completion of a SELPA wide needs assessment to determine current status of integration, resources available and activities necessary to support the successful return of students to regular school campuses.

3) Visitations to other model integrated school sites by administrators, parents and teachers.

4) Provision of inservice training on curriculum development and strategies for integration.

5) Participation by the SELPA administrator in the STRATEGIES conference on integration.

6) Presentations to general education staff and students regarding integration and developing peer supports.

7) Provision of ability awareness training for elementary students and training middle school students to be ability awareness trainers in the county.

8) Participation of school site teams from Colusa H.S., Williams Elementary and Arbuckle Elementary schools in Schools Are For All Kids training and in the "School Site Teams for Inclusive Education: A Training Institute".

Outcomes for this SELPA Include:

1) A comprehensive full inclusion plan for Colusa H.S.

2) All students with severe disabilities are served in full inclusion programs at their neighborhood schools.
    a. Williams Elementary-5 students
    b. Williams Middle-1 student
    c. Arbuckle Elementary-5 students
    d. Pierce H.S.-1 student
    e. Egling Middle-3 students
    f. Maxwell Elementary-1 student

3) Presentations by SELPA staff with project staff at numerous national, state and local conferences.

4) Selection and participation of Full inclusion programs as California Implementation Site demonstration programs. Visitations have been made by educators from Switzerland, Guam, as well as many states in the U.S. and school districts in California.

5) Spread of full inclusion to students with learning disabilities through non-categorical grouping of students under a funding unit. Itinerant teachers for these students have more than one credential.

e. Merced County SELPA is located in a rural, agricultural area of California. The 21 school districts and county office participating in the SELPA serve approximately 43,000 students, approximately 250 of whom are severely disabled. For many years, students with severe disabilities were served only at the special center in Livingston. With the strong advocacy of the Director of Special Education, transitions to regular school sites was begun. PEERS agreed to work with Merced County SELPA through Training and Resources for Community and Curriculum Integration (TRCCI), since one of the project staff, Mr. Neary, also worked half time for TRCCI and was involved in their systems change efforts through TRCCI. In requesting PEERS services, the SELPA expressed its desire to move all students with moderate and severe disabilities to regular school sites.Multiple activities occurred in Merced SELPA to support this effort including:

1) Establishment of an Integration Support Team consisting of parents, general and special education administrators and teachers, related service providers and community agency representatives.

2) Completion of a comprehensive needs assessment regarding current integration practices, resources and needed steps to support integration.

3) Inservice training by project staff for the Support Team, Merced County staff and district staff.

4) Informational meetings with parents.

5) Informational meetings with district superintendents and the SELPA Community Advisory Committee on Special Education.

6) Participation in training institutes on "School Site Teams for Integration" and School Site Teams for Inclusive Education"

7) Provision of ability awareness training by county staff.

Outcomes for this SELPA include:

1) Transition of 117 students from the special center to regular education school sites, involving 13 special day classes.

2) The involvement of 2 students in full inclusion situations at Fremont Elementary.

2. Southern California Region

a. **San Diego Unified School District** is a single district SELPA serving approximately 124,000 students. Prior to the PEERS project, San Diego USD provided services to some students with severe disabilities at two special centers, Mission Beach and Revere. At the start of the PEERS Project in San Diego, many students were already served on regular school campuses but these were not necessarily their home schools. San Diego had taken a strong position regarding integration in the district and requested services from PEERS in order to assist the district in moving the final students from special centers to regular school sites and also to assist in regrouping heterogeneously to allow for students to attend school closer to home. A number of activities occurred during the project to support the district including:

1) The establishment of a district Integration Support Team involving parents, special and general education staff, administrators, related services staff, community agency staff and university staff.

2) Completion of a comprehensive needs assessment process to develop an integration plan for the district.

3) Provision of extensive inservice training on strategies for integration and inclusion to district special and general education staff.

4) Informational meetings regarding transitions from the special center programs to regular school sites for parents.

Outcomes for this SELPA include:

1) The elimination of the remaining two special centers, Revere and Mission Beach as service centers for students with severe disabilities.

2) Relocation of 10 special day classes to general school sites. San Diego USD now has 73 classes located at 56 school sites throughout the district for students with severe disabilities compared to 33 classes at 13 sites in 1985.

3) 85% of students with severe disabilities now attend their neighborhood schools or nearby school.

4) By 1993-94 school year, all students will attend their neighborhood school or nearby school.

5) Approximately 40 students are in full inclusion situations in their school of residence. Involved sites are: Birdrock; Hearst ; Lafayette; LaJolla ; Marvin ; Mason; Mirimar; Spreckels; Tierrasanta and Torrey Pines Elementary schools; Memorial Junior High and Muirlands Junior High.

b. **North Coastal SELPA** is located in the San Diego area and involves approximately 360 students with severe disabilities. North Coastal SELPA includes 14 school districts serving approximately 78,000 students. Prior to participation in the PEERS Project, North Coastal SELPA provided services in both special centers and in special day classes on regular school sites. The SELPA requested assistance from the project to gather data and information for the development of a five year plan for integration and to assist the SELPA in achieving that plan. Activities supporting the SELPA during the project period were:

1) The establishment of a SELPA LRE Task Force consisting of parents, administrators and teachers from both regular and special education, community service agencies and related service providers to develop recommendations for the SELPA governance.

2) Provision of inservice training at both the awareness and implementation level for a variety of constituencies including the SELPA cabinet, special and general education staff, parents and students.

3) Provision of technical assistance to school sites in integration and inclusion.

4) Establishment of school site teams for integration.

5) Visits to nearby model sites for integration and inclusion.

Outcomes for this SELPA include:

1) 10 special day classes transitioned to regular school sites involving 85 students with severe disabilities.

2) 15 students involved in full inclusion programs at two school sites, Mission Meadow and Olive Elementary in Vista USD.

3. Southern Region

C. Mid Cities SELPA: January 1991-September 1992

Activities:

The Mid-cities SELPA developed two primary teams to work with PEERS staff.

The integration support team met every two months through June. This team consists of a variety of school personnel from the school districts within the SELPA: Bellflower, Paramount, Compton, Lynwood, and Los Angeles County.

The core team met every month, and included the primary districts contacts from each of the five (5) school districts.

The primary focus of the two groups from June through September was 1) the development of inservice packets, and 2) the development of a SELPA wide integration plan.

Related Activities

PEERS Staff Meetings: 04/07/92, 05/05/92, 06/ /92
PEERS Advisory Meeting: 01/23/92
Integrated Resource Institute: 02/27/92
"Schools Are For All Kids:: 04/02/92-04/03/92
Facilitated Communication Workshop: 04/23/92
CAL-TASH Conference: 04/23/92-04/25/92*
Special Education Innovation Institute: 06/24/92*
Special Education Innovation Institute: 06/24/92-06/26/92*

* Presenter

Core Team Meetings

03/31/92
04/29/92
05/12/92
06/09/92
07/01/92
07/15/92
07/15/92
07/22/92
07/29/92
08/05/92
09/29/92

Support Team Meetings

02/28/92
05/29/92

Outcomes:

The inservice packets were developed for each group identified as needing information on inclusion/integration (e.g., Board of Education, Superintendents, parents, teachers, students, etc.).

The packets outlined the content of each presentation and listed available resources (Attached).

Beginning in March the focus of the core group was the development of an integration plan for the SELPA.

PEERS staff provided sample plans for team members to review. In April an outline was developed and different core team members assumed primary responsibility.

The core team worked on the plan throughout June and July. Preliminary drafts were submitted in September to the core group. The development of the plan continues to be in process. PEERS staff has requested a copy of the final draft.

LRE Activities

The movement of classes to more age-appropriate school sites continues. Two transition sites were developed and two classes of secondary age students moved to community-based settings as of June, 1992.

Within the County structure, Principal Administration Units have realigned geographically. This provides opportunities for students to attend schools closer to their homes (but not necessarily their neighborhood school) and transportation pick-up and drop-off time match district sites.

Final Notes

PEERS staff encouraged core team members to recruit more parental involvement. Parents need to be involved in both the inservice trainings and the development of the SELPA Integration Plan.

(d) Santa Monica-Malibu Unified School District (Year 05) Activities:

PEERS staff have worked with Santa Monica-Malibu District staff, participating in a variety of meetings working to form a strong and committed Integration Support Team. There were four planning meetings (2/24/92, 4/8/92, 4/27/92, and 6/18/92) as well as site visits on 3/18/92. As the IST began to form it became apparent that there was a definite need for in depth information and discussion on the subject of full inclusion before the IST could really solidify and begin systematic planning. Four "IST" meetings were held (3/12/92, 3/26/92, 5/12/92, and 5/28/92), but they were primarily devoted to dialogue on the subject of full inclusion. They also focused somewhat on appropriate membership on the IST. Attendance at these IST meetings was somewhat sporadic. Still, by the end of June, Santa Monica-Malibu staff felt optimistic that in the fall of 1992, when the new school year begins, a strong IST will be in place and ready to begin planning for systematic provision of fully inclusive education. PEERS staff provided the district with as much information and as many tools as possible to help them in their efforts next year. This district has had fewer outcomes than most others involved in PEERS because their direct of special education changed within a month of PEERS selection of the LEA, and the new director was uninterested in PEERS services until the last six months of the project.

(e) Long Beach Unified School District
Long Beach U.S.D., an urban LEA with 75,000 students, participated in PEERS first project period. A comprehensive plan was developed and implemented, and this plan was included in the Year 02 Continuation Proposal. Long Beach has proceeded with the plan, and developed integated options for more than 150 students during its involvement with PEERS.

(f) Ventura COE SELPA This large multi-LEA SELPA developed a five year plan, participated actively with PEERS and demonstrated major systems change over the four year period. The following document lists outcomes of their plan to date which now also involve development of inclusive option.

IXE. SELPA/LEA Updates and Outcomes

Year 05 SELPAS/Districts (LEAS)

1. Bay Coastal Region

(a) Sonoma County SELPA, a consortia of 42 districts and a county office of education, serves approximately 600 students with moderate to severe disabilities on integrated sites, however, the majority of these are special education classes not necessarily located in students' home or district schools. The county has a large rural area, as well as the cities of Santa

UPDATED FEBRUARY 1993

Ventura County SELPA PEERS Project
"Integration of Students with Severe Handicaps"

STATUS REPORTS
(This document corresponds to TIMELINE of PROJECTED ACTIONS)

East County

Preschool:

(1) Place 3-5 yr. old SH Ss in selected settings w/non-handicapped peers. **(91-92) (92-93) (93-94) (94-96)**

4/14/92 Conejo site moved from Triggs - only CAA for 5 year olds.

10/13/92 Las Virgenes included some SH 3-5 year olds in non-categorical prechool. /

10/13/92 SH Preschool located at early childhood center in Moorpark.

Elementary :

(2) Moorpark & VCSS study long-term implications of Moorpark becoming operator for SDC-SH on age-appropriate site(s). **(91-92)**

Intermediate:

(3) Study availability of intermediate school sites for SH Ss throughout East County. **(91-92) (92-93)**

4/14/92 No change/action.

10/13/92 Moorpark would like to have a VCSS 6-8th grade class located at the new middle school in Moorpark.

(4) During annual reviews, SVUSD will continue to review placements of Ss with OH handicaps by considering the full range of special and regular education options. **(91-92) (92-93)**

All OH Ss in integrated settings. **(93-94)**

4/14/92 No Report

(5) VCSS & Conejo continue to study age-appropriate opportunities for integration of students with severe handicaps located at Conejo School. **(91-92)**

4/14/92 Ongoing process - developing; some activities begun.

VCSS students at Conejo School will participate in age-appropriate integrated activities as appropriate. (92-93)

(6) LV studies solutions for wide age-span of noncategorical SDC. (91-92)

4/14/92 Could divide into 2 classes if had another unit.

Evaluation:

(7) Implement the approved evaluation component to track student outcomes related to integration opportunities at these sites: Conejo (VCSS) and Garden Grove (SVUSD). (91-92)

4/14/92 Has not yet been implemented.

10/13/92 Data has been collected at Conejo - Garden Grove, compilation not complete.

2/9/93 Conejo and Garden Grove evaluations have been complete.

Refine & update evaluation component as necessary. Further implementation & evaluation as appropriate. (92-93)

2/9/93 Document approved. Moorpark High School to be surveyed this spring.

Implement the evaluation component to track student outcomes. (93-94)

Compile evaluation results for presentation to Boards. (94-96)

West County

Preschool:

(8) Place 3-5 yr. old SH & OH Ss in selected settings with non-handicapped peers. (91-92) (92-93) (93-94) (94-96)

4/14/92 Discussion - move class from Dwire to San Miguel.

10/13/92 No additional classes available.

2/9/93 Oxnard School District has moved a class of non-severe students and have included some S.H., at San Miguel.

Elementary:

(9) Study demographics of students in Oxnard Interdistrict region. (91-92)

4/14/92 Several meetings were held.

Utilize demographics study to explore options for further integration of Ss with severe handicaps. (92-93)

(10) Update demographics of students in Ventura Interdistrict region. **(91-92)**

4/14/92 Meetings were held. *See attached notes re: Saticoy/Penfield.

Utilize demographics study to explore options for further integration of Ss w/SH. **(92-93)**

(11) Study availability of intermediate school sites for SH Ss throughout West County. **(91-92)**

4/14/92 Studied - no sites available at this time. (Oxnard, Hueneme, Pleasant Valley)

10/13/92 No sites available.

An additional integrated school site will be available for Ss w/SH. **(92-93)**

2/9/93 No sites available. Perhaps year after next?

(12) Study criteria for East or West County placement options for Pleasant Valley SH Ss. **(91-92)**

4/14/92
- Need to change SELPA agreement re: students with "TMR."
- Need to develop agreement between Pleasant Valley Elementary School District and Oxnard Elementary School District.

(13) Met - Ventura Unified studies integrated space for 2 SDC-SH for Ss currently @ Penfield and VCSS & Ventura Unified study creation of "comprehensive site" @ Penfield/Saticoy Schools. **(91-92)**
4/14/92 Possiblity of three Saticoy Kindergartens moving to Penfield, and two Penfield classes moving to Saticoy; pending business department approval.

Ventura Unified studies provision of additional integrated space for 1 SH Ss currently @ Penfield. **(92-93)**

6/9/92 1 OH/SDC and 1 SH/SDC from Penfield will move to Saticoy in September 92; a first and second grade class from Saticoy will move to Penfield.

10/13/92 2 SH Classes, Preschool and 6-9; and 1 OH preschool class from Penfield now located on Saticoy campus.

10/13/92 First and second grade class now located at Penfield. No physical barriers remain between sites.

VUSD provides integrated space for SDC-SH for Ss @ Penfield. **(92-93)**

VUSD provides integrated space for 1 SDC-SH for Ss @ Penfield. **(93-94)**

All elementary & intermediate SH Ss in Ventura Interdistrict Region on integrated sites. **(94-96)**

(14) Ventura Unified SDC-SLI classes continue to transition to SDC-SH heterogeneously grouped classes by accepting referrals for Ss w/a greater variety of handicapping conditions. **(91-92)**

4/14/92 Continuing to do this.

Ventura Unified SDC-SLI classes continue to transition to SDC-SH heterogeneously grouped classes by accepting referrals for Ss w/a greater variety of handicapping conditions. **(92-93)**

All VUSD SDC-SLI will be grouped heterogeneously SDC-SH. **(93-94)**

10/13/92 Discussions in Ventura Unified School District regarding "higher functioning" SH/LH class.

15) Oxnard Elementary SDC-SH classes transition to SDC-SH heterogeneously grouped classes by accepting referrals for Ss w/a greater variety of handicapping conditions. **(91-92) (92-93)**

4/14/92 "Under Advisement" - Oxnard Elementary School District considering starting a 3 - 5 year old class.

All OESD SDC-SLI classes will be heterogeneously-grouped SDC-SH. **(93-94)**

(16) Met - Oxnard Elem. provides age-appropriate integrated space for remaining SDC-SH @ San Miguel, when accomplished provides space for preschool SDC-SH @ Dwire. **(92-93)**

4/14/92 Planned for 92-93 (1st - Richen) - under discussion.

6/9/92 92-93 an additional preschool class from Dwire will be moved to San Miguel

10/13/92 Class for 4-6 year olds open at Ritchen School.

10/13/92 A preschool class from Dwire has been moved to San Miguel.

San Miguel is site for all preschool SH-SDCs in Oxnard Region. **(93-94)**

(17) Oxnard Elementary studies provision of age-appropriate integrated space for SDCs-SH from Dwire. **(93-94)**

4/14/92 Space for Dwire classes at McAuliffe under discussion.

10/13/92 Space for Dwire classes at McAuliffe not available.

All elementary & intermediate SH Ss in Oxnard Interdistrict Region on integrated sites. **(94-96)**

(18) PVSD/VCSS study provision of sites for Ss with SH in P.V. (92-93)

4/14/92 Uncertain until site distribution determined by board.

10/13/92 No sites available at this time.

2/9/93 No sites available at this time.

Evaluation:

(19) Implement the approved evaluation component to track student outcomes related to integration opportunities @ these sites: De Anza (VCSS), Kamala (OSD), Fremont (OSD), and San Miguel (OSD). (91-92)

4/14/92 DeAnza has been completed - results will be available at June 9 meeting. Others in process.

10/13/92 Compilation at Kamala, Fremont and San Miguel.

2/9/93 Compilation at Kamala, Fremont completed.

Refine & update evaluation component as necessary; implement as appropriate at additional sites. (92-93)

2/9/93 San Miguel, Saticoy and Ritchen to be conducted this year.

Implement the approved evaluation component to track student outcomes. (93-94)

Compile evaluation results for presentation to Boards. (94-96)

East and West

High School:

(20) Study demographics of West County High School SDC Ss for consideration of integrated placements. (91-92)

4/14/92 A proposal was sent to V.U.S.D. by VCSSO staff for a Ventura area high school SH/SDC.

Based upon study results, SDCs-SH for Ss 14-18 yrs. old will be distributed to the selected high school sites. (91-92)

Explore feasibility of High School SDC-SH in Ventura area. (92-93)

4/14/92 Memo from VCSS to V.U.S.D. - request for integrated space on V.U.S.D. High School; meeting at end of month with parents; space is tight.

10/13/92 Have identified a full class of 15 students in the Ventura area and are making preparations to move the class from Rio Mesa to Ventura High School by second semester.

10/13/92 Ventura County Superintendent of Schools secondary class located at Moorpark High School.

2/9/93 Class at Ventura High School to open April 19 (will include students from Ventura and Ojai)

OUHSD/VCSS will explore feasibility of provision of H.S. SDC for SH Ss within OUHSD. (92-93)

Based on study results, SDCs-SH for Ss 14-18 yrs. old will continue to be distributed to the selected integrated high school sites. (92-93)

2/9/93 Simi Valley Unified School District placed high school class from Sequoia Middle School at Royal High School.

All 14-18 yr. old Ss w/SH will be on age-appropriate integrated sites. (94-96)

2/9/93 Oxnard Union High School District will administer programs for S.H. high school students from Oxnard Union High School District, Santa Paula Union High School and Fillmore Unified School District.

(21) VCSS & O.U.H.S.D. study further integration opportunities for SH Ss @ Nueva Vida & Rio Mesa High Schools. (91-92)

4/14/92 Increased integration activities at Nueva Vida, Oxnard Union High School, and Rio Mesa. Integrated dances at Rio Mesa. New Oxnard High School building will be integrated.

Nueva Vida & Rio Mesa SH Ss participate in campus activities @ their respective H.S.'s at increased levels. (92-93)

10/13/92 Discussions are set up for Rio Mesa - activities are progressing.

2/9/93 All students integrated for extracurricular activities and breaks.

(22) Met - During annual reviews, O.U.H.S.D. will continue to review placements of students with orthopedic handicaps (OH) by considering the full range of integrated special and regular education options. (91-92) (92-93)

4/14/92 Ongoing.

All OH O.U.H.S.D. students in integrated settings. (93-94)

4/14/92 Met in '92.

10/13/92 Increasing numbers of students are being placed in "shared responsibility" (district/county) placements.

(23) Planning for VCSS SH facility on new OUHSD campuses. (92-93) (93-94)

4/14/92 Completed - separate building on campus.

10/13/92 Working on it.

Nueva Vida site closed, classes located at new OUHSD campuses. (94-96)

2/9/93 Nueva Vida to be closed July 1993.

2/9/93 Oxnard Union High School District making request to state for more classroom space.

Community College:

(24) Explore feasibility of placements at community colleges and/or Adult Education sites for post-secondary Ss with SH. Study the relocation of SDCs-SH for Ss 18-22 yrs. on age-appropriate sites through-out the SELPA in closer proximity to Ss home districts. (91-92)

4/14/92 Being studied including community colleges or adult education sites. Identified potential locations.

10/13/92 Doesn't look feasible to relocate on community college campuses.

SDCs-SH for Ss 18-22 yrs. of age will be relocated throughout the SELPA to age appropriate integrated sites selected the study year. (92-93) (93-94)

All 18-22 yr. old Ss w/SH will be on age-appropriate integrated sites. (94-96)

(25) Implement the approved evaluation component to track student outcomes related to integration opportunities at Newbury Park H.S. (VCSS) (91-92)

4/14/92 In process.

10/13/92 Data has been collected at Newbury Park High School. (compilation not complete)

2/9/93 Compilation conplete for Newbury Park High School.

Refine & update evaluation component as necessary. (92-93)

2/9/93 Evaluation component approved.

Continue to implement the approved evaluation component to track student outcomes related to integration opportunities. (93-94)

Compile evaluation results for presentation to Boards. (94-96)

(26) Participation in commencement ceremonies by Ss w/SH to be discussed. (91-92)

4/14/92 Royal and Simi - participate based on IEP and behavior. Newbury Park High School are welcome. Oxnard High - now ok this year. Rio Mesa - not quite yet.

All Ss w/SH given opportunity to participate in commencement activities. **(94-96)**

4/14/92 Met - Simi

4/14/92 Met - Conejo

10/13/92 Met - Oxnard Union High School District

10/13/92 Explore possibility of participation in commencement exercises at Ventura High School.

10/13/92 Met - Moorpark Unified School District

Rosa and Petaluma. PEERS selected Sonoma from its final application group to work with them on the dual objectives of enhancing existing integration and developing inclusive education options. Multiple activities took place over the 18 month project period from February 1991 -August, 1992, including:

1) Formation of comprehensive Integration Support Team with administrative issues, curriculum development and inservice subcommittees, and monthly working meetings.
2) Visits to model inclusive sites of the California Implementation Sites Network (CIS) throughout the Bay Area, by committee members.
3) Liaison with and presentations to the SELPA Steering Committee, Superintendents' Council, teachers groups and Community Advisory Council for Special Education,
4) Completion of a comprehensive needs assessment on the status of integration, including a survey to 100 principals county-wide, with subsequent analysis (50% return),
5) Development of a local curriculum adaptation manual by that subcommittee based on teacher surveys returned by 65% of teachers polled, and
6) Comprehensive inservice on inclusive education in June and August of 1992.

Outcomes in this SELPA include:

1) Development of an inclusive education program for students in five schools across four districts (Old Adobe-Petaluma, Santa Rosa, Piner-Olivet and Healdsburg) operated by Santa Rosa City Schools in 9 students' home schools, with growth expected in 93-94;
2) A county-wide three day Collaboration Conference attended by over 250 general and special educators and parents from Sonoma and neighboring counties, including a full-day workshop by the staff involved in the inclusive education option, and keynote address by the PEERS Coordinator;

3) Technical assistance requests and resources to existing county operated integrated programs and
4) A comprehensive ability awareness program developed with the Community Advisory Council and now available by request county-wide.

In addition, as multiple requests for inclusive education continue, the SELPA plans to expand the option across many more LEAS, and is developing short and long range plans for these efforts.

b) San Lorenzo Valley U.S.D.

This Santa Cruz Mountain district has four elementary schools, a middle and a high school. All of their students with severe disabilities are now served in integrated settings by staff from the County Office of Education. After attending PEERS' 1990 week long Summer Institute on Inclusive Education with a school site team focused on including two students; during 1990-91 SLVUSD applied in April 1991 for PEERS' assistance to target the inclusion of their elementary students, and the development of change processes and support to accomplish this.

Multiple activities took place in the 16 month period between June, 1991 and October 1992:

1) Formation of a collaborative district - county Integration Resource Team to plan for and monitor inclusive efforts, with strong parental, general and special educator representation,
2) Visits to model inclusive sites (CIS), by team members and others,
3) Consideration of inclusive education within the overall LEA strategic planning effort,
4) Formation of a Community/Ability Awareness Task Force as a subgroup of the LEA Strategic Plan Group,
5) Integration into high school of students previously served in Ludlow Center, a special school,

6) Participation in research on full inclusion conducted by the California Research Institute (CRI) and PEERS,

7) Delivery of comprehensive inservice on inclusion in August 1991, June and August of 1992 for staff at each home school where inclusive education would occur (three elementary schools),

8 Planning for return to the home high school by students attending a neighboring high school, in 93-94.

Outcomes in this PEERS district include:

1) Inclusive education of elementary aged students in three elementary home schools, in a collaborative program with the county office of education, with plans for the fourth school in 1993-1994,

2) Development (in process) of infused ability awareness education for general education students throughout key core curriculum areas,

3) Selection of the program as a California Implementation Site for the CDE network,

4) Co-presentations with SLVUSD and Santa Cruz COE staff at the national TASH conference,

5) All of the students in the district now attend integrated or inclusive programs,

6) In December, 1992, the County Office of Education sponsored a two-day Schools Are For All Kids (CRI) workshop, attended by a team from SLVUSD as well as 70 other participant teams from neighboring LEAS. SAFAK II is planned for February, 1993.

7) The County Office of Education Planning council has met with the former PEERS Coordinator to discuss how to best plan for expansion of inclusive education beyond the four districts where it now exists as an option.

Years 01-04

1. Bay Coastal Region (see also previous reports)

(a) Oakland U.S.D. - an urban LEA with approximately 600 students with severe disabilities (ADA about 55,000) has made a major systems change with PEERS' assistance from Year 01 through the present follow-up activities, as reported in previous continuation proposals. The district closed two out of three special centers during Year 01, and has turned the third into a more integrated environment by sharing its space, administration and some instruction with the adjacent elementary school. Additional outcomes include:

1) Integration of over 500 students with severe disabilities into home or nearby schools, with continued movement toward home school placement in the city's 100 schools,
2) Inclusive education programs for the majority of O.U.S.D. preschoolers in conjunction with state funded Child Development Centers, Headstart , and State preschools, for over a dozen programs,
3) Three team-taught general-special education kindergarten programs
4) Implementation of an integrated therapy model,
5) An inclusive education program at Allendale Elementary School, growing out of the team-taught kindergarten, for first through fourth graders, with further growth expected and
6) Initiation of a middle school inclusive program at Claremont Middle School,
7) Development of a comprehensive procedures manual for integrated, community intensive programs, including new role descriptions and use of district report card procedures and formats,
8) Development of an ability awareness manual distributed into all programs,
9) Initiation of coordinated service delivery with the San Francisco State University grant project,
10) Participation in CRI/SFSU and PEERS research over the course of several years.
11) Selection of several sites as CDE implementation sites and as CSU Hayward model training sites for personnel preparation

(b) Napa SELPA and District - Original PEERS efforts focused on integration of segregated high school students during Years 03-04 into home school programs, and return of district programs from county operation to the LEA, with all students now in integrated settings. Additional technical assistance and training during Years 04-05 focused on developing inclusive education options within home schools and coordination with restructuring efforts. Outcomes include:

1) Eight of 21 elementary schools now have inclusive options utilizing a variety of support models from itinerant categorical support to resource/special class staff utilization within general education classes; and plans to further coordinate and expand efforts with ongoing restructuring work in the LEA,
2) Restructuring of district special education administration to be within the general education governance system, rather than separate, thus creating a unified system.

c) North Region SELPA

This SELPA, consisting of five districts, two of which are large urban/suburban settings (Berkeley U.S.D., Alameda U.S.D.) applied for Year 02 PEERS support to assist them in bringing back those students then served by the Alameda County Office of Education. All students are now served in integrated, district operated schools, and inclusive programs have been developed.

Outcomes include:

1) Inclusive education programs at John Muir and Arts Magnet Elementary Schools in Berkeley U.S.D.
2) Selection of the Berkeley program as a CDE CIS (Implementation site for PEERS, TRCCI)
3) Co-training and presentations with the staff at local, state and national conferences, workshops,

4) Co-authorship with the Berkeley inclusion facilitator, Morgen Alwell and CRI, of the systems change manual (development by CRI and PEERS,)
5) Development of an Inclusion Support Team this year to focus new efforts on expansion of inclusive options in B.U.S.D.,
6) Participation of B.U.S.D. in CRI-PEERS research efforts,
7) Selection of the Berkeley program as a model training site for the CSU Hayward personnel preparation program

d) Mid Alameda County SELPA

In Year 01 MAC SELPA received PEERS support for return to its four LEAS of students attending segregated county operated programs. These students were successfully integrated into Hayward, San Leandro, Castro Valley and San Lorenzo Schools. Since that time, the SELPA has progressed in several areas. All students attend integrated programs, and additional outcomes include:

1) An Inclusive education program at McKinley Elementary School in San Leandro
2) Selection of this and four other sites as model training sites for the CSU Hayward teacher training program, with plans to incorporate several sites within the CDE California Implementation Sites Network,
3) Development and implementation of a research study examining principals' ownership in inclusive and integrated schools.

e) Solano County SELPA

This Year 03 SELPA requested and received PEERS support to develop integrated preschool options for its students with severe disabilities within the five LEAS and county office of education. All of the school age students had or obtained integrated placement options during this time period as well. Several preschool options were developed as a outcome of PEERS activity:

1) team-taught preschool with Recreation Department sponsored generic programs for toddlers and preschoolers,
2) integration of neighborhood children into a formerly center based preschool,
3) co-location of Headstart with a special preschool,
4) inclusion of students with severe disabilities into local community college ECE program,
5) itinerant specialized support to preschoolers in private preschools.

In addition, the SELPA has initiated an inclusive option for elementary age students in Vacaville in 1992-1993, with plans for further expansion.

f) Santa Clara SELPA III

This Year 02 SELPA, in one of the largest, most densely populated counties, applied for and received support to expand and enhance its integrated options. The County Office of Education remains the primary deliverer of services to seven SELPAS, and still maintains some segregated settings, the only SELPA of those described to do so at this time. However, several positive outcomes have occurred, including:

1) Development of an integration resource manual in 1990 by members of the original Integration Support Team,
2) Development and implementation of a comprehensive ability awareness program,

3) Advocacy with local parent groups and individual parents to expand integrated and inclusive options, and

4) initial plans within San Jose U.S.D. and the county office of education to develop and implement inclusive education options throughout the SELPA, beginning with initial programs in 1993.

X Location of Further Information and Assurance Statement

The full final report and appendicies have been sent to ERIC Clearinghouse as required, with copies of the title page and abstract to the organizations and agencies as designated in the Final Report Format provided at the 1992 Project Directors meeting and delineated in 20 U.S.C. 1409 (g) New Dissemination Requirement. In addition, the final report and further information are available at the California Department of Education, Statewide Programs Unit in Special Education, P.O. Box 944272, Sacramento, CA 94244 through Steven Johnson, Administrator of Statewide Services, (916-657-3256). Project information may also be obtained from Coordinators.

- Ann Halvorsen, Ed.D. (510-881-3087)
  Department of Educational Psychology
  PEERS II: Outreach
  CSU Hayward
  Hayward, CA 94542 or

- Tom Neary (916-641-5930)
  PEERS II: Outreach
  650 Howe Ave. Suite 300
  Sacramento, CA 95825

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Appendix A

Integration/Inclusion Needs Assessment

PEERS

PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

INTEGRATION/INCLUSION NEEDS ASSESSMENT

REVISED EDITION 1992

Ann T. Halvorsen, Ed.D
Lynn Smithey, M.A.
Tom Neary, M.A.
Suzanne Gilbert, M.A.

Adapted from
Integration Needs Assessment

Developed by
Ann Halvorsen Ed.D.

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Sponsored by the California Department of Education, Special Education Division.

GUIDELINES FOR USE OF THE INTEGRATION/INCLUSION NEEDS ASSESSMENT WITH LOCAL EDUCATION AGENCIES

Part 1: Review of LEA's Integration/Inclusion Plan (pp. 1-7)

This part of the needs assessment is for use with LEAs (districts, counties, or SELPAs) which have developed a written plan for integration/inclusion transitions. This may be a long - or short-range plan involving all or some of the programs for students with disabilities. If no such plan exists, the reviewer or individual conducting the assessment may wish to recommend that the LEA initiate plan development through a "support team" or LEA Committee involving representatives of all interested constituencies (administrators from general and special education, parents, teachers, related service personnel, PTA, Special Education Advisory committee, interested community agencies, etc.)

Where an integration/inclusion plan exists, the reviewer should use the criteria in Part 1 for evaluation of plan components in order to determine whether all areas such as : LRE policy, student placement, physical plant availability and selection, accessibility criteria, staff assignments, administrative roles/responsibilities, interagency agreements, site and staff preparation, definitions of integration and/or inclusion , and facilitation of peer interactions, have been addressed.

Where specific plan components are missing or inadequate, the reviewer can use the assessment data to provide input to the LRE support team regarding expansion or modification of the written plan. The reviewer may also wish to refer to Part 2 Background Information, for additional interview questions or observational items which can supplement written plans. All data collected as part of the total needs assessment process should be shared with the participating LEA and LRE Committee members.

LEA= Local Educational Agency
SELPA= Special Education Local Planning Area

6/92

INTEGRATION/INCLUSION NEEDS ASSESSMENT

Developed by Ann T. Halvorsen, Ed.D.
Peers Project

Part 1: Review of the LEA's Integration/Inclusion Plan
(To be used if a written plan exists)

Have the following dimensions been addressed adequately in the LEA plan?

1. LEA policy statement on LRE:
   - ◊ exists._____
   - ◊ in development, assistance requested._____
   - ◊ needs development_____
   - ◊ too broad/noninclusive of students with severe disabilities_____
   - ◊ inclusion is described as an option in the plan_____
   - ◊ other comments:_____

2. Definitions of integration and inclusion and rationale for integration/ inclusion of students with severe disabilities (sd) for :
   - ◊ All components included._____
   - ◊ Missing key features._____
   - ◊ In development, assistance required._____
   - ◊ Needs development._____
   - ◊ Rationale not included, needs development._____
   - ◊ Other:_____

"sd" =students with severe disabilities

If no written LEA integration/inclusion plan has been developed, proceed to Part 2.

3. Student selection and placement plans including:

   - Factors for consideration (e.g., heterogeneity, age-appropriateness of school for students, home/magnet school, geographic location, etc.) have been delineated._____
   - No guidelines as yet._____
   - Guidelines are in development, assistance requested._____
   - Process for student placement has been well defined._____
   - Process needs development, assistance requested._____
   - Other: ____

     ____

4. Physical plant selection criteria and availability:

   - Criteria have been delineated and are comprehensive, including consideration of home/magnet school option._____
   - No criteria as yet, need assistance in developing._____
   - Criteria incomplete, need assistance._____
   - Space availability survey for LEA:

     Complete _____ Not yet completed _____

   (See part 2 re: criteria.)

5. Accessibility of available sites:

   - All sites have been evaluated for accessibility (interior/exterior)._____
   - No assessment as yet._____

◊ Assessment complete; modifications to some sites will be required._____

◊ Modification plans developed._____

6. Teacher and paraprofessional selection/assignment:

◊ Guidelines for selection/job descriptions are adequate and in place._____

◊ Not in place, need assistance to develop._____

◊ Teachers and paraprofessionals have _____ have not _____ had input into guidelines and selection process.

◊ Teachers and paraprofessionals have been assigned._____

7. Organization of administrative responsibility across programs:

◊ LEA/SELPA/ county office responsibilities clearly delineated _____ not delineated _____

◊ Service delivery plans and administrative responsibilities within system clearly defined _____ not yet defined_____ (e.g., chain of command; who will supervise integration teachers and inclusive education support staff, who does teacher report to, etc.)

Comments: ____

____

____

8. Interagency agreements and involvement: Organization and assignment of related services:

◊ Interagency agreements (e.g., with CCS) are in place and do not present constraints to integration/inclusion plan._____

◊ Agreements need revision for integration/inclusion to be effective._____

◊ Related service assignments have been worked out _____ not worked out _____

◊ Related service personnel are involved _____ not involved _____ need to become involved in integration/inclusion planning _____

CCS= California Childrens' Services (Physical Therapy Services)

9. Continuity of integrated/inclusive program across ages/school levels (elementary/middle/high school/post secondary):

◊ Plans and timelines exist for placement of students at all levels.____
Plans do not yet exist, no specific timelines in place.______

◊ Plans exist but space/classrooms unavailable and/or in negotiation.______

◊ No plans, assistance requested.______

10. Preparation of Special Education staff (faculty and administration):

◊ Comprehensive inservice plan has been developed ______.
is being implemented. ______ is in development. ______
assistance requested. ______

◊ Topics for inservice:
address audience needs re: integration/inclusion. ______
need expansion. ______

◊ Resources for inservice (e.g., released time) are ______
are not available ______; assistance requested. ______
(See also Part 2.)

11. Preparation of parents of sd students:

◊ Comprehensive inservice plan has been developed. ______
is being implemented. ______ is in development. ______
assistance requested. ______

◊ Topics for inservice
address audience needs re: integration/inclusion. ______
need expansion. ______

◊ Resources for inservice (e.g., released time) are ______
are not available ______; assistance requested ______
(See also Part 2.)

◊ Parents are ______ are not ______
currently involved in integration/inclusion planning.

◊ Parents are ______ are not ______
generally in support of integration/inclusion plan.

12. Preparation of general education administration:

◊ Comprehensive inservice plan has been developed. ______
is being implemented. ______ is in development______
assistance requested. ______

◊ Topics for inservice
address audience needs re: integration/inclusion._____
need expansion. _____

◊ Resources for inservice (e.g., released time) are_____
are not available _____; assistance requested_____
(see also Part 2.)

13. Preparation of school site(s) personnel

◊ Comprehensive inservice plan has been developed._____
is being implemented. _____ is in development. _____
assistance requested. _____

◊ Topics for inservice
address audience needs re integration/inclusion._____
need expansion. _____

◊ Resources for inservice and team planning(e.g., released time)
are_____ are not available _____ assistance requested_____
(see also Part 2.)

◊ Mechanism is _____ is not _____
in place for ongoing support to principals.

◊ Mechanism is_______ is not_______
in place for school site level teams.

14. Preparation of general education students at all targeted school sites:

◊ Comprehensive inservice plan has been developed. _____
is being implemented. _____ is in development _____ ,
assistance requested. _____

◊ Topics for inservice
address audience needs re: integration/inclusion._____
need expansion. _____

◊ Resources for inservice (e.g., released time) are_____
are not available _____; assistance requested _____
(see also Part 2.)

◊ Plans have _____ have not _____
been approved by site principals/faculty.

◊ Site preparation will _____ will not _____
occur in advance of the start of the program as well as after students
are present.

15. Preparation of parents of general education students:

◊ PTA(s) has _____ has not _____
been involved in/aware of integration/inclusion plans.

◊ Principals will have responsibility for informing/involving parents
through school bulletins, PTA meetings, etc. _____

16. Strategies to facilitate effective integration/inclusion on site:

◊ District and school site practices which will facilitate interactions and the facilitation of peer relationships have ____ have not _____been delineated (e.g., inclusion in activities across environments, teacher responsibilities within the school, transportation schedule and coordinated school hours, etc. (See part 2).

◊ Mechanisms and procedures are
in place _____ are being developed _____ do not exist _____
for creating structured interaction programs (e.g., peer tutoring, circles of friends) to involve general education students (Inside Work Experience, service credits, elective courses where appropriate. (See Part 2.)

◊ Sd students IEP goals do _____ do not _____
reflect integrated/inclusive placement and interaction opportunities.

◊ Each school site has developed _____ is developing _____
its own integration/inclusion plan.

◊ School site plans do not exist, assistance is requested._____

◊ Other: ____

____

____

____

____

17. Evaluation of integration/inclusion practices:

◊ Observational data and IEP data
have been _____ have not been _____ will be _____
collected to evaluate integration/inclusion on an ongoing basis across sites.

◊ Other types of data (check which apply)	To be collected	Collected
% of instructional time spent in integrated/inclusive school and community environments	_____	_____
Attitudinal data (nd students' attitudes toward sd students)	_____	_____
Social validity data (e.g., consumer satisfaction from parent, sd, student, administrator viewpoint).	_____	_____
Data on rates and quality of social interaction between students with disabilities and peers.	_____	_____

◊ Other: ____

____

◊ No program evaluation plan exists, assistance requested. _____

PEERS PROJECT

GUIDELINES FOR USE OF THE INTEGRATION/INCLUSION NEEDS ASSESSMENT WITH LOCAL EDUCATION AGENCIES

Part 2: Background Information for Integration/Inclusion Needs Assessment (pp. 8-26)

Part 2 in not intended to be used as a format for a single interview of one individual by the person conducting the needs assessment. Given the number of questions and the scope of areas covered, Part 2 data should be collected through several observations, discussions with the LRE support Team (where one exists), or through conversations and/or interviews with : the director of special education, as well as the administrators specifically in charge of special education programs for students with disabilities, general education principal(s), special education teacher(s), parent(s) of students with severe disabilities, Advisory Committee members, and related service personnel (district and CCS).

Part 2 Information will assist in identifying the history and goals of the LEA in regard to integration and inclusion; attitudes within the LEA toward integration and inclusion; what resources exist to support transitions; whether space within accessible schools is a problem for the integration efforts and whether issues such as inclusion in general education, transportation and personnel role changes, site preparation needs, and parent reactions to the integration/inclusion plan have been considered. Thus, Part 2 can be used as a problem-solving tool with the LRE Support Team. For example, under IV: Parents of Severely Disabled Students, if the reviewer's conversations and interviews indicate that parents are unaware of the integration/inclusion plan or that the Community Advisory Council has not been involved in planning, she/he would recommend that meetings for parents and coordinated planning with the CAC be initiated immediately. She/he might also suggest that visits be arranged for parent representatives to existing nearby model integrated/inclusive programs, so that parents can see an integrated or inclusive program in action, and acquire information as to how the model could be adapted to meet their sons' and daughters' needs in their own district.

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PEERS PROJECT

Part 2: Background Information: Potential Questions for Integration/Inclusion Needs Assessment

For LEAs In Integration/Inclusion Planning Stages

1. Administrative/Systems level

   A. Governance Structure of LEA

      1. Is this a county office of education, multi district/county SELPA, or single district SELPA?

      2. If county operated:

         ◊ Are the districts currently involved in integration/inclusion planning with the county? _____

         ◊ Will students be selected from all districts? _____

         ◊ Will integrated and inclusive sites be geographically distributed throughout the county or will only a few districts be initially involved? _____

         ◊ How many students are targeted for initial phase of plan? _____

         ◊ What procedures is/has the county engaged in to obtain space/classrooms and how successful have these been? ________

         ____

         ____

         ____

         ____

Key: COE = County Office of Education
SELPA = Special Education Local Planning Area
CAC = Community Advisory Council for Special Education

◊ What procedures is/has the COE engaged in to work collaboratively with districts to develop inclusive education at the school site level?______________________________

____

____

____

____

◊ Will these be the first county programs on district sites? _____
How long has the COE served students on district sites?_____

3. If multi district SELPA operated:

◊ Are/will students (be) located throughout the SELPA? _____

◊ Will students attend integrated/inclusive programs in their own district or in another district in SELPA? _____
If outside own LEA, what is the rationale for this?______________

____

____

◊ What proportion of students/classes are now integrated/fully included? __________ What ages and how many are targeted for integration/inclusion transition? ____________

4. If single district operated:

◊ Is integration planned to occur district wide? _____

◊ Will inclusive education be offered district wide?______

◊ What proportion of students/classes are now integrated/ what age groups? __________

◊ What proportion are included in general education classes?_____

◊ Will students attend their neighborhood schools? _____

COMMENTS:______________________________

____

____

- Part 2 can be used as an overall reference and is not meant to be employed as one interview. Information may be obtained through observations and/or a series of conversations/interviews.

B. Inclusive Models

If the district is planning to offer an inclusive model, what type of structure/program is under consideration? Check any/all that apply:

1. Itinerant special ed services across classes in one school.______
2. Itinerant special ed services across______ schools.
3. Noncategorical special ed services delivered in itinerant manner in one school.______
4. General ed/special ed team teaching._______
5. Other.____

____

C. Policy

1. Is there a current Board of Education policy on LRE/integration/inclusion? What does it say? If no B of E policy exists, is there a Department of Special Education and/or a CAC policy on integration/inclusion? How recent are these? Do they indicate strong support for and understanding of integration/inclusion?

2. Is there an existing long range LEA plan for full integration/inclusion? Who developed it? Is there a consensus across constituencies (Sp/General Ed. admin., teachers, parents, related service staff) regarding this plan or the need to develop a plan?

3. Is there any kind of an Integration Task Force and/or "LRE Committee" in the LEA? What is its membership? Does it include representation from: General/Sped administration (central and site), teachers, parents/CAC, community and related services? If not, is the LEA open to forming such a committee for this task and granting it decision making responsibilities?

4. If inclusion is being considered as an option is the LEA aware of the waiver necessity and the process for utilizing special class units in an itinerant manner?_________

5. Where is the impetus for integration/inclusion coming from, i.e., who has been advocating for this? Is this an administrative decision alone, or have parents, teachers and other constituencies been involved?

6. In general, what are the general attitudes about integration/inclusion across constituencies:

   General ed admin.:

   Sped admin.:

   General ed teachers:

   Sped teachers:

   General ed parents:

   Students:

   Related services:

7. Is there a consensus on the definition of integration and a clear understanding of its components in contrast to desegregation and mainstreaming? ________ How does the LEA define integration?

   ____

   ____

8. Is there a consensus on the definition of inclusion?__________

   How is it defined?_______________________________________

   ____

D. Resources for integration/inclusion

1. What types of support are or can be made available for the planned transitions, e.g.,

   ◊ Resources for inservice on strategies, curriculum, etc. to general/special education staff:

   ◊ Resources for necessary materials when students/programs transition:

   ◊ Resources for site modifications if needed:

E. Space

1. How many special centers currently exist in the LEA? Are they homogeneous, e.g., "single disability" focused schools? ____________

____

2. How many classes/students are in these centers? ________________

3. a.)How many (if any) integrated classes are there now and what are their current locations?____________________
   Are they chronologically age appropriate?________________
   Are they within natural proportion of sd to nd? ________________

____

   b.)How many (if any) inclusive education programs are there now?________

      Locations?____________________

      Grade levels?____________________

      Number of students involved?____________________

4. a.)How many new integrated programs will be targeted for the planned integration effort? What ages are the students? _________

   b.)How many of these will be inclusive education programs?______

5. What level schools (pre/elem/med/hs/comm. college) are going to house the new programs? ____________________

6. Are the general education public schools "overenrolled" (short on space) at present? What assurances exist regarding the longevity of the space for Sped classes? Who in the LEA is involved in space negotiations? Are they/can they participate on the integration/inclusion support team? ____________________

____

____

7. Is the available space/classroom(s) centrally located in the target school(s)?_______ Will students be dispersed throughout the school (rather than clustered in one wing)? _________ Will students attend general education "homerooms"?__________

8. What plans exist for future utilization of former center sites after integration? Can any of these be utilized as integrated school sites (elem) with only 2-5% of their population comprised of severely disabled students? ____

____

____

F. Accessibility

1. What proportion of the targeted or potential school sites in the LEA is accessible at present?

   Elem _____

   Mid / JHS _____

   HS _____

2 Are all internal areas accessible on each site? If not, what areas need modification/which schools?____________________________

____

____

3. What proportion of students to be integrated/included at each age level will require accessible school locations?

   Elem _____

   Mid / JHS _____

   HS _____

4. Which schools' restrooms have any accessible stalls? Which require modifications? ____

____

5. What plans exist for modifications if there are too few or no accessible schools available? ____

____

6. How many "non-sd" sped students (e.g., "OH," MH," "SED") are already attending these schools? ____________________

7. How accessible are these school sites to community instructional locations?

____

____

G. Personnel

1. Will the integration/inclusion plan require any transfers of teaching or other staff (e.g., from county to district employment)? Has this process been worked out?

2. Who will be responsible for supervision of integrated classes?

   School site principal _____

   District Sped administrator _____

   County Sped administrator _____

3. If school site principal: has this role change been planned for with principals and communicated to them? How will sped support be provided for technical assistance?

4. What plans are in place for special ed support for students in inclusive classes?

5. What is the plan for related service delivery on integrated sites? Will OTS/PTS/STs, etc. have geographically distributed caseloads? Have CCS and LEA related service personnel been involved in integration planning? If not, can they be at this time?

6. How will related services be delivered to students in inclusive classes?____________________

   ____

   Have related service personnel been involved in planning for this?____________________

7. Are there existing interagency agreements regarding the number of students needing therapy and/or the number of hours needed on site for delivery of services? Can these be modified it they present constraints to integration/inclusion?

H. Transportation

1. Who currently transports students? Is this the same service as that provided for General ed students (if any are bussed)? Are Sped and General ed transportation services coordinated?
2. Have transportation representatives been involved in integration/inclusion planning? If not, can they be at this time?
3. How will integration/inclusion effect routing and length of bus rides for sd students?
4. Will transportation "drop-offs" and "pick-ups" match the school hours for general education students at these schools? If not, can this be altered so that schedules are the same?
5. Will transportation be available during school hours if needed for community programming?
6. How accessible is the public transit system? Is it in close proximity to the school(s)?

II. Teacher level

A. Selection

1. How many teachers are needed for the newly integrated students? ______

    a.) General education for inclusive sites:_______ Grade levels:____

    b.) Special education:____________

2. Will this be a voluntary move for them? Have they been informed of integration/inclusion plans? Have they been involved in planning? If not, can they be at this time? Is the teachers' association represented on the planning task force? ________________________________

    ____

    ____

3. Is general feeling about integration/inclusion positive? What, if any are teachers' concerns?
4. Are there plans to consider noncategorical grouping in order to serve more students at their home schools?___________

5. What criteria are being utilized for teacher selection? Do any of the teachers have previous integrated/inclusive experience? Do any have dual credentials (Learning Handicapped/Severely Handicapped)?

6. Are job descriptions being revised? Who is developing these? Will teachers have input?

B. Preparation

1. Which of the following are the most important training needs for general and special educators in your district?

◊ Inclusive education models_____

◊ Strategies for ability awareness education _____

◊ Strategies for collaboration/consultation _____

◊ Strategies to promote interactions _____

◊ Adapting general education core curricula _____

◊ How an effective general education school (elem/mid/hs) functions _____

◊ Community intensive programming from integrated/inclusive school sites_____

◊ Vocational training opportunities in and around school sites _____

◊ Structured interaction programs (e.g., peer tutoring/PALS/circles of friends/MAPS) _____

◊ Parent participation in integration _____

◊ Heterogeneous groupings _____

◊ Noncategorical groupings_____

◊ Cooperative learning strategies_____

◊ School restructuring and special education

◊ Other ____________________

2. Will inservice be provided on a released time or after school basis or both? ____________________

____

3. What are the timelines for inservice? ____________________

4. Who will deliver the inservices? ____________________

5. Have teachers had (or will they have) opportunities to visit model integrated/inclusive programs in the LEA or elsewhere? Can this be arranged? ____________________

____

6. When will teachers be informed that they have been selected? Will this allow for time for them to be involved in advance site preparation activities (e.g. team set up and planning) as well as curricula activities such as school and community inventorying? Is released time support available for either or both of these activities? ____________________

____

____

7. a.) How will general education teachers for the inclusive program be selected? ____________________

   b.) When will they be notified of selection? ____________________

   c.) Will there be release time available to them for training and collaborative planning? ____________

C. Staffing

1. How will paraprofessionals be selected and distributed across sites and classrooms? ____________________

____

____

2. a.) What will the ratio of teachers and paras be for each class in integrated sites? ____________________

   b.) What will the ratio be for included students? ____________________

3. Will paraprofessional job descriptions require modification for inclusive programming? If so, how will this occur? ____________________

____

III. Severely Disabled Students

A. Groupings and Selection

1. What are the current age ranges of students at special center or segregated sites? Are these chronologically age-appropriate, i.e., do they correspond to regular public school age ranges:

Preschool	3-5 (approx.)
Lower elem	6-8
Upper elem	9-11
Mid/JHS	12-14
HS	15-18
Transition	19-22

2. Who will be involved in regrouping of students (as needed) for integration/inclusion according to several criteria including:

◊ Home school

◊ Age-appropriateness

◊ Heterogeneity (not all limited mobility students in same grouping, mix of students)

3. How are the first students to be integrated/included being selected? Have parents been involved in planning? Are all parents aware of the LEA's integration/inclusion plan? If not, when will they be informed and be invited to participate in planning?

____

____

4. Are the number of targeted students to attend each site within natural proportion guidelines? ____________________

5. Will all sd students in the LEA have the opportunity for integrated/inclusive placement now or in the future? What are the timelines for this? (How long-range is the integration/inclusion plan?)

____

____

____

6. Do students have current IEP objectives which reflect integrated/inclusive opportunities and interaction with nd peers across domains/activities?

____

7. Do IEPs include percentage of time spent in general education environments?__________

8. Do IEPs of currently included students reflect their membership in general education classes?__________

IV. Parents of SD students

A. Attitudes toward integration/inclusion and participation

1. a.)What is the general feeling among parents about integration? ______

____

____

b.)What is the general feeling among parents about inclusion?_____

____

____

2. What concerns do parents have? Have these been addressed in the plan? How? ____

____

____

3. Are parents participating in planning? If not, can they? ______________

____

4. Is the CAC* for Sped involved in planning? ______________________

____

*CAC= *Community Advisory Council*

5. Is the PTA involved? ______________________________

6. Are there any existing parent support groups at special centers and if so, what is their position about integration/inclusion? ______________

7. Have parents been provided with opportunities to visit model integrated/inclusive programs in the LEA or outside of it?

8. What types of "inservice" will be offered to parents and guardians regarding integration/inclusion? Will they be included in the teacher inservices? ______________________________

9. How will parents be involved in the school site teams at inclusive sites? ______________________________

V. School Site Level Planning (for each school site)j

A. Administrative considerations.

1. Is/are the principal(s) supportive of integration/inclusion? Did they have a choice about program location at their sites? What is the principal's involvement in the placement process?

2. Will s/he have the same responsibilities for special education students as they would for any other students in the school, or will they be separately administered by district or county Sped staff? (If the latter, can this be changed?) ______________________________

3. Does the principal have any prior experience with Special Ed ? Please describe. ______________________________

____

4. Will inservice or technical assistance be available from the Sped administration for the principal prior to the start of the program? Who will provide ongoing support after the program is in place?

____

____

5. What are the principal's concerns about integration/inclusion, if any? (e.g., safety/emergency procedures)/ Have these been addressed in the plan?______________________________

____

____

6. What is the principals' perception of integration/inclusion and the extent to which students will be participating in the daily life of the school? Is s/he open to students participating in all environments (e.g., cafeteria, auditorium, yard, hallways, locker rooms, gym, restrooms, home ec rooms, library, computer room) and activities (e.g., assemblies, lunch, recess, nonacademic subjects, etc.)?

7. What is the principal's perception of inclusion and the extent to which students will participate as full members of their class/es across all classroom activities?______________________________

____

8. What type of inservice or site preparation activities would the principals like to have in each school for their staff and student body?

____

____

9. What types of information does the principal think staff and students will need prior to and after the program begins? ______________________________

____

____

____

10. Are there regular faculty meetings in the school? Should presentations be made to faculty about the new programs at one or more of these meetings?______________________________

____

11. What is the "hierarchy" of the school and what do Sped teachers new to the site need to know about school rules and protocol? __________

____

B. General education students

1. What is the student enrollment?________________________

2. What are the major student organizations? (secondary, mainly)

____

____

____

____

3. Is there a school newspaper or bulletin in which articles about integration/inclusion can appear before and after the change occurs?

Yes?______ No?______

Is there a parent newsletter?

Yes?______ No?______

Will the general education parents receive any information about the new program?

Yes?______ No?______

If yes, how will this be provided?

4. Secondary: Is there an elective course structure and/or service units or credit for student work experience in the school, which could be utilized to facilitate peer tutoring or friends programs?__________

5. How should or can general ed students best be recruited for these peer programs? Which of the following vehicles are available:
    - bulletin
    - announcements
    - bulletin boards
    - through guidance counselors/electives
    - through meetings with departments
    - through meetings with individual faculty
    - through student government meetings
    - through student clubs
    - through discussions or presentations to individual classes or grades
    - Other:
6. What is the school schedule for nondisabled students? If it is not the same as Sped, can Sped change to match the schools' hours?
7. How is lunch period organized? Is there more than one? Can students sit anywhere, or are tables assigned to grades? (elem.)
8. How are recesses organized? When do they occur? Who supervises?
9. How are special subjects organized, e.g.:
    - Gym/PE
    - Art
    - Music
    - Home Ec
    - Library
    - Other

    Are there special subject teachers?

10. Are there other Sped programs in the school ? How will the programs work together?

C. Staff

1. How many and what types of staff are there on site:

General Ed teachers _____

Sped teachers _____

Paraprofessionals _____

Administrators _____

Counselors _____

Bilingual/LEPs teachers _____

Special subject teachers _____

Librarians _____

Nurses _____

Janitorial _____

Cafeteria _____

Secretarial/Office _____

Security _____

Other: _____

2. Are staff organized into departments? Yes?______ No?______

Is Sped a separate department? Yes?______ No?_______

If yes, can this be changed?

3. Are there regular faculty meetings? Yes?_______ No?_______
When? ______________ What other committee responsibilities or other roles do teachers have?

4. How are prep and lunch periods organized and scheduled? Will Sped staff have the same periods?

5. What is the general staff attitude about integration/inclusion? are they supportive, concerned, unaware? What concerns do they have?

6. How does staff feel about organized ability awareness education for themselves and their students? What information about the students and program do they want?

GUIDELINES FOR USE OF
THE INTEGRATION/INCLUSION NEEDS ASSESSMENT
WITH LOCAL EDUCATION AGENCIES

Part 3: On-site Review of Integration/Inclusion

This part of the Needs Assessment Process can be utilized as an observation and for interviews to evaluate the nature and quality of integration/inclusion in regular elementary or secondary schools which do have support services for students with severe disabilities on the site. Part 3 covers six areas, environmental considerations; school climate; special education teacher integration; general education classroom environment; student integration and the curricular and instructional model in place.

A school site plan should be developed with participation from all integrated/inclusive teachers. Key administrators (school principal and special Ed. administrator where appropriate) should be involved in this process. Goals and objectives need to include timelines and specific strategies for implementation, as well as the specific types and resources for assistance that will be provided to the teacher(s), (e.g., Inservice areas and who will deliver this inservice to teachers, plans for released time, substitutes, etc.).

Sites should be reevaluated on at least an annual basis, to ensure continuity of exemplary programs and positive changes in programs needing assistance.

If no integrated/inclusive sites exist in the school district, Part 3 can be utilized with teachers, parents, and potential school site personnel as a planning tool to ensure successful interactions at future integrated/inclusive sites.

6/92

IMPLEMENTATION SITE CRITERIA FOR FULL INCLUSION PROGRAMS

Many of these *Implementation Site Criteria* have been taken from or adapted from: Meyer, Eichinger & Park Lee (1987). "Program Quality Indicators." JASH, Winter, 255-257.

This tool is intended to assist in the identfication of schools providing quality inclusive educational programs for students with severe disabilities. It may also serve as a needs assessment tool for schools establishing inclusive education.

Please check as appropriate and comment as necessary.

	yes	no	sometimes	comments
I. Environmental Considerations				
A. Facilities				
1. Students are included in age-appropriate(+/- 1 yr.) general education homerooms.	☐	☐	☐	
2. School is the one students would attend if non-disabled.	☐	☐	☐	
B. Student issues				
1. K-12 full inclusion programs have been established.	☐	☐	☐	
2. Students have the same school calendar and hours as their general education peers.	☐	☐	☐	
3. Identified special education student numbers are within natural proportion guidelines.	☐	☐	☐	
II. School Climate				
A. Ownership				
1. Principal is *ultimately* responsible for implementation of the program, which includes supervision and evaluation of program staff.	☐	☐	☐	
2. There is a defined plan or process for supporting staff in implementation (ie. time for team planning meetings).	☐	☐	☐	
3. Ongoing site preparation or "ability awareness" occurs and/or is incorporated into generral education curriculua.	☐	☐	☐	

PEERS 1991

	yes	no	sometimes	comments
4. The school mission statement reflects a philosophy that every child is educable and considers the school to be accountable for serving all kids.	☐	☐	☐	
5. The school philosophy emphasizes responsiveness to families and support to meet family needs.	☐	☐	☐	
6. The school philosophy supports the need for staff inservice training on a regular basis.	☐	☐	☐	
III. Special education teacher integration				
A. The special education teachers have responsibilities within the school to:				
1. attend faculty meetings with general education staff.	☐	☐	☐	
2. participate in regular supervisory duties (eg. lunch/bus/yard duty).	☐	☐	☐	
3. participate in extracurricular responsibilities (eg. chaperone dances, work with student clubs).	☐	☐	☐	
4. follow school protocol: keep principal or appropriate administrator informed on an ongoing basis.	☐	☐	☐	
B. Special education teacher interaction includes:				
1. positive public relations skills with general education staff.	☐	☐	☐	
2. taking lunch breaks and/or prep periods in the same areas as general education staff at least once a week.	☐	☐	☐	
3. arranging meetings with general education staff as necessary for maintaining communication with involved faculty.	☐	☐	☐	

C. Special education teacher modeling and instruction includes:

	yes	no	sometimes	comments
1. consistently modeling positive attitudes towards and appropriate interactions with all students.	☐	☐	☐	
2. using age-appropriate terminology, tone or voice, praise/reinforcement with all students.	☐	☐	☐	
3. employing age-appropriate materials in instruction.	☐	☐	☐	
4. designing students' programs to include instruction of functional activities in many school and non-school settings.	☐	☐	☐	
5. implementing behavior management strategies that are positive and utilize natural cues/corrections to the maximum extent possible.	☐	☐	☐	
6. writing IEP objectives and individual programs to reflect interaction with nondisabled peers.	☐	☐	☐	
7. developing non-classroom environments in the school to be used for interactive functional activities for appropriate portions of the school day.	☐	☐	☐	

IV. General education classroom

A. General education classroom teacher:

	yes	no	sometimes	comments
1. provides safe, orderly and positive learning environment for all students.	☐	☐	☐	
2. establishes high expectations for all students.	☐	☐	☐	
3. monitors student progress systematically.	☐	☐	☐	
4. participates as an IEP team member.	☐	☐	☐	

	yes	no	sometimes	comments
5. utilizes cooperative learning strategies.	☐	☐	☐	
6. utilizes multi-dimensional performance groups.	☐	☐	☐	
7. individualizes activities for students.				
8. participates as a member of the school integration team.	☐	☐	☐	
9. collaborates with others in coordinating peer network/interaction systems.	☐	☐	☐	
10. encourages and supports friendship development for all students.	☐	☐	☐	
11. collaborates with parents/care providers.	☐	☐	☐	
12. collaborates with special education teacher and paraprofessional(s).	☐	☐	☐	
13. team teaches with special education teacher.	☐	☐	☐	
14. collaborates with special educator(s) to adapt learning objectives for students within the context of the core curriculum.	☐	☐	☐	
15. collaborates with special educator(s) to make material and environmental adaptations.	☐	☐	☐	
16. collaborates with special educator(s) to provide physical assistance as needed.	☐	☐	☐	
17. allows for alternative/substitute curriculum as appropriate.	☐	☐	☐	

V. Student integration

A. General school activities include:

1. Students have access to all school environments for programming and interactions.	☐	☐	☐	

		yes	no	sometimes	comments
2. Students participate in and are integrated for regular activities such as: (check activities)					
music	field trips	☐	☐	☐	
art	home ec.	☐	☐	☐	
library	work exper.	☐	☐	☐	
gym	recess/break	☐	☐	☐	
lunch	computer use	☐	☐	☐	
assemblies	regular class	☐	☐	☐	
clubs	other:	☐	☐	☐	
3. Students participate in grade level activities (eg. 8th grade dance, 6th grade camping trip, senior's graduation).		☐	☐	☐	

B. Interaction with peers during the school day.

	yes	no	sometimes	comments
1. Students instructional programs incorporate interaction with general education students in the following areas (check all that apply):				
a. communication skills (within activities)	☐	☐	☐	
b. social skills (within activities)	☐	☐	☐	
c. community domain functional activities	☐	☐	☐	
d. vocational domain functional activities	☐	☐	☐	
e. recreation/leisure domain	☐	☐	☐	
f. domestic domain functional activities	☐	☐	☐	
g. other (specify):	☐	☐	☐	
2. Students are involved in regular structured interaction programs with age-appropriate nondisabled peers such as (check all that apply):				
a. peer tutoring in school and community	☐	☐	☐	
b. "PALS" (Partners at Lunch)	☐	☐	☐	
c. regular education class activities (list)	☐	☐	☐	
d. co-workers in job training	☐	☐	☐	

Implementation Site Criteria for Full Inclusion Programs

	yes	no	sometimes	comments
3. Strategies to support inclusion and foster friendships are employed (check all that apply):				
a. Maps	☐	☐	☐	
b. Circle of friends	☐	☐	☐	
c. Other (specify):	☐	☐	☐	
4. These interactive programs are:				
a. well organized	☐	☐	☐	
b. positive in orientation (emphasizing student strengths, focusing on functional activities)	☐	☐	☐	
c. well attended	☐	☐	☐	
d. supported by principal, faculty and parents	☐	☐	☐	
e. viewed as a positive experience by students	☐	☐	☐	
C. Ongoing provision of information				
1. General education students have received information about disabilities via (check all that apply):	☐	☐	☐	
a. slide show presentation and discussion about the students	☐	☐	☐	
b. learning stations or simulations about learning disabilities	☐	☐	☐	
c. commercial media (films etc.)	☐	☐	☐	
d. guest speakers who have disabilities	☐	☐	☐	
e. disabilities unit within general education curricula, role playing, modeling and feedback from special education teacher regarding how to interact with or instruct specific students	☐	☐	☐	
f. specific training in systematic instructional techniques including data collection (peer tutors)	☐	☐	☐	
g. informal discussion/Q&A sessions with special education staff	☐	☐	☐	
h. other (specify):	☐	☐	☐	

Implementation Site Criteria for Full Inclusion Programs

	yes	no	sometimes	comments
D. Extracurricular activities				
1. Students with disabilities are involved in extracurricular activities associated with the school:				
a. clubs	☐	☐	☐	
b. dances	☐	☐	☐	
c. after school recreation/day care	☐	☐	☐	
programs	☐	☐	☐	
d. scouts				
e. other:	☐	☐	☐	
2. Students with disabilities currently have access to the following extracurricular activities: (list)	☐	☐	☐	

VI. Curricular and instructional model

	yes	no	sometimes	comments
A. The implementation site teacher:				
1. has organized each student's program according to the following domains:	☐	☐	☐	
a. community	☐	☐	☐	
b. domestic	☐	☐	☐	
c. recreation/leisure	☐	☐	☐	
d. vocational	☐	☐	☐	
e. academic integration				
2. (regarding the domains listed above), emphasizes interaction with nondisabled peers within these activities.	☐	☐	☐	
3. has developed IEP objectives based upon the parent interview process.	☐	☐	☐	
4. plans activities using materials, instructional procedures and environments that are age-appropriate and individualized.	☐	☐	☐	

Implementation Site Criteria for Full Inclusion Programs

	yes	no	sometimes	comments
5. instructs all students in natural environments maintaining natural proportions.	☐	☐	☐	
6. completes functional assessments for all targeted activities.	☐	☐	☐	
7. involves related service staff in functional assessments in natural settings.	☐	☐	☐	
8. develops written instructional plans for each IEP objective.	☐	☐	☐	
9. works with related service personnel to provide integrated therapy services with nondisabled peers.	☐	☐	☐	
10. collects specific data to document student performance and to identify a need for program modification.	☐	☐	☐	
11. periodically probes for maintenance and generalization in the natural environment.	☐	☐	☐	
12. develops adaptations which are useful across environments, to facilitate independence.	☐	☐	☐	
13. utilizes positive programming and other nonaversive strategies in behavior change programs.	☐	☐	☐	
14. assists families in accessing community resources.	☐	☐	☐	
15. initiates systematic planning to support transitions from one program to another.	☐	☐	☐	

The *Implementation Site Criteria* are utilized to identify potential sites to serve as internal demonstration sites. It is not meant to be a tool for evaluation. Completion of these criteria should identify strengths and result in the identification of growth objectives.

Appendix B

LEA Plan

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Proposed

RIVERSIDE COUNTY SELPA

INCLUSION/INTEGRATION IMPLEMENTATION PLAN

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Statement of Purpose

The Integration Support Team of the Riverside County SELPA has worked to produce a plan to improve integration opportunities for students with severe disabilities who go to school within the SELPA. The team has become familiar with the newest research and practices in the the field and has studied the material available with the purpose of applying it in situations specific to Riverside's unique needs. The work has resulted in recommendations for a direction in which the SELPA might move to improve integration with a policy that is as forward looking as possible. The team has included in its recommendations objectives dealing with implementing fully inclusive schooling for all students, including students with severe disabilities. The recommendations that the team has made are presented in this document, the Inclusion/Integration Implementation Plan.

The purpose of the plan is to set forth the team's recommendations, after putting them in the context of an overall philosophy. The document contains a legal and historical perspective, and looks to the future suggesting a monitoring and revision process for the plan. Parameters for the plan are specified, clearly defining guidelines for implementation. Where appropriate the plan includes resources that might be accessed in putting recommendations into practice.

The team recognizes that inclusion/integration is a process that requires thoughtful collaborative planning over time. It is the team's intention that this document serve as a basis for that planning.

Philosophy Statement

The Integration Support Team of the Riverside County SELPA believes that education must foster acceptance of every child by parents, students, professionals, and the greater community. To this end, the team supports:

- equal access for all students to general education and special programs,
- opportunities for social interaction among all students regardless of sex, ethnicity, or innate ability,
- stressing similarities between students with and without disabilities,
- the SELPA position on the Least Restrictive Environment as outlined in the Local Plan.

The Integration Support Team believes that all children will benefit from the academic and social resources available in the educational environment. The team therefore encourages a full range of educational options in integrated settings, including the option of full inclusion. These settings require:

- support to increase social skills,
- collaboration of general education and special education teachers,
- integration of students in their neighborhood schools,
- fostering of natural supports and interaction opportunities for students with and without disabilities.

The Integration Support Team believes that all students should transition from school as accepted members of society in typical living, working, educational, and recreating environments.

The team recognizes that integration/inclusion involves a systematic, ongoing process. Continuing review of the plan is necessary as part of long range planning.

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Legal and Historical Perspective

The mandate for including/integrating students with disabilities has developed over many years through legislation, court decisions, and research in educating all students using fair, positive, and successful practices. A brief review of the law, court decisions, and the implcations of research follows.

In 1954, the Supreme Court, in Brown vs. Board of Education, held that educating students separately results in unequal education. The court used the now familiar phrase, "separate is not equal". The decision had immediate implications regarding racial inequalty in our schools, but it also had an impact on challenges in later years to separate education of students with disabilities. In the early 1970's courts were in the process of establishing the basic right of students with severe disabilities to a free appropriate public education, and in 1973 the Rehabilitation Act, Section 504, guaranteed rights of persons with disabilities in educational institutions that receive federal money. PL94-142, the Education for All Handicapped Children Act (EHA) was passed in 1975. It is now entitled The Individuals with Disabilities Act (IDEA). PL94-142 set many guidelines concerning education of students with disabilities, including a guarantee that students with disabilities be educated in the "least restrictive environment". The LRE provision is worth quoting:

> "...to the maximum extent appropriate, handicapped children...are educated with children who are not handicapped, and ... special classes, separate schooling, or other removal of handicapped children from the regular educationenvironment, occurs only when the nature or severity of the handicap is such that education in regular classes with supplementary aids and services cannot be achieved satisfactorily. (20 U.S.C. 1412 [5], 1975)"

Despite the fact that the law specifies that students with disabilities be educated in the least restrictive environment, special education has traditionally been seen as a place, generally a separate place, where students go to receive services. Students with disabilities, especially students with severe disabilities, have historically been "placed" in a "program" that was frequently segregated from non-disabled peers. However, in the1970s research in the field began to show an increasing awareness of the benefits of all students being educated together. There was a growing advocacy for educating students with disabilities in their neighborhood schools with non-disabled peers, and evidence that segregated placements should be eliminated. By the late 1970s and early 1980s students with disabilities were being educated in general education environments with access to most regular school facilities. Integration was being seen as "good for kids".

Research that is emerging now focuses on further advancements in integration with students with disbilities spending more and more time time not just in general education schools, but in general education classrooms. Students with disabilities are becoming primary members of general education classes. They are being "included". In order for inclusion to happen while special education remains intact as required by law, special education is being provided as a service and a support, not as a place or program. It is being shown that special education services can be delivered in a variety of ways in a variety of settings.

The Riverside County SELPA has a history of support of education of students with disabilities in the least restrictive environment....

The SELPA Community Advisory Committee (CAC) was formed in April of 1979. The Least Restrictive Environment Committee is a subcommittee of the CAC. The LRE committee has "...pursued several strategies in order to facilitate successful integration throughout the SELPA." ("Planning for Tomorrow") The LRE committee, and the SELPA administration, working together, have become more and more involved in full inclusion in recent years. During the '89-'90 school year there was considerable interest in the Homecoming Model presented by the State of Vermont, and a pilot program was run in the Palm Springs Unified District based on the Vermont model. During that year William and Susan Stainback were asked to work with the SELPA to explore integration models appropriate on a SELPA wide level. In the meantime, more and more students with severe disabilities were being fully included at parent request on a "kid-at-a-time" basis.

During the '91-'92 school year the SELPA participated in the PEERS project, a statewide systems change project designed to assist SELPAs or Districts to systematically improve options for integration and inclusion of students with severe disabilities. The current Inclusion/Integration Plan is the result of the SELPA's collaboration with the PEERS project.

Sources:

Rainforth, B., York, J., and Macdonald, C. Collaborative Teams for Students with Severe Disabilities. Baltimore: Paul H. Brookes Publishing Company, 1992.

Stainback, S., Stainback, W., and Foresy, M. Educating All Students in the Mainstream of Regular Education. Baltimore: Paul H. Brookes Publishing

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Notes on a monitoring and revision process:

Once the plan is approved (the current intention is to present this document to the coordinating council in October, 1992) the IST needs to determine a reasonable and effective way to monitor and report on progress in meeting objectives. As part of this process the team may need to meet occasionally, perhaps quarterly. This part of the plan has not been developed yet and needs attention in the near future.

9/92 IST mtg

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Parameters (Items to consider...)

Participation in the plan--which districts?
requirements for cooperation between
districts and County operated programs ?

Guidelines to be followed in full inclusion programs
(PEERS suggested guidelines, ~~and~~ Implementation Site
Criteria, and inclusive education quality indicators attached as a resource.)

Guidelines for integrated programs
(PEERS Implementation Site Criteria ~~and set of quality indicators~~
attached as a resource.)

Sample of parameters outlined in the Ventura County SELPA Plan attached.

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OBJECTIVES

Develop models of/for inclusion/integration
Inclusion

1. Identify and compile an annotated list (who is fully included, what support is in place and how is it structured...) of sites within the Riverside Selpa that are providing fully inclusive education and that could serve as implementation sites to visit.

Timeline: by 12/92
Person Resp.:
Resources: District principals/teachers who have students with disabilities fully included

2. Identify and compile an annotated list of sites in California that are providing fully inclusive education and that could serve as model sites to visit.

Timeline: by 12/92
Person Resp:
Resources: State Dept. of Education Implementation Sites
CRI at San Francisco State University (access by 9/30/92)

3. Review currently existing quality indicators of fully inclusive programs and revise or adopt a set.

Timeline: by 12/92
Person Resp:
Resources: PEERS project
CRI at San Francisco State University (access by 9/30/92)

4. Support staff within the SELPA who are already involved in fully inclusive programs. Bring them together for a meeting to express their specific needs for support, and to develop a plan to provide that support.

Timeline: by 12/92
Person Resp:
Resources: PEERS Riverside SELPA Integration Support Team

5. Provide awareness training on full inclusion to district principals from districts participating in the SELPA PEERS project, covering philosophy and all support issues. Identify at least two principals willing to pilot full inclusion programs at their sites and produce a product in cooperation with the Riverside SELPA outlining generic practices in putting full inclusion in place in the SELPA.

Timeline: by/1/93
Person Resp:
Resources: TRCCI state specialist
Interwork Institute at San Diego State University
Diversity Conference-January 28-30, 1993
Bill Gillenwater (principal, Scott School, Colorado)
Staff within SELPA already involved in full inclusion
Information available through TASH, Cal-TASH
Current research and literature
Check with State Dept. of Education for more resources

6. At the identified sites, assign a "historian" to keep notes that will document the process of implementing full inclusion "from scratch" so that clear documentation will be available for writing a final product.

Timeline: by 1/93
Person Resp:
Resources: None really needed

7. At the identified sites, conduct a needs assessment for fully inclusive schooling.

Timeline: by 2/93
Person Resp:
Resources: PEERS Full Inclusion Implementation Site Criteria

8. Begin awareness training on fully inclusive schooling at the identified sites. Target all parents and staff at the sites and cover philosophy of full inclusion and support needed, including the necessity for collaborative teaming.

Timeline: by 2/93
Person Resp:
Resources: (see goal #5)

9. Establish site/building level teams to begin collaborative planning for full inclusion at the identified sites (determine whether or not these teams can grow out of existing site integration teams or other existing site teams). Identify site specific team members, meeting logistics, and initial issues to address.

Timeline: by 4/93
Person Resp:
Resources: Site needs assessments completed 2/93
TRCCI state specialist
SELPA program specialist
District level program specialists
Current literature and research

10. Provide training for collaborative team members. Cover instructional planning teams, curriculum adaptation, and other classroom issues.

Timeline: by 4/93
Person Resp:
Resources: (see goal #5)

11. Identify students with severe disabilities at the identified sites who will be fully included at the start of the next term.

Timeline: by 4/93
Person Resp:
Resources:

12. Establish instructional planning teams for the identified students.

Timeline: by 4/93
Person Resp:
Resources: (see goal #9)

13. Begin drafting a document outlining the process that the identified sites have gone through to establish fully inclusive schooling at their sites.

Timeline: by 6/93
Person Resp:
Resources: The Homecoming Model from Vermont
Ed Smith School's document on fully inclusive schooling
(out of Syracuse, New York)

14. Implement full inclusion at the identified sites.

Timeline: by 9/93
Person Resp:
Resources:

15. Complete document outlining practices for the Riverside SELPA to implement full inclusion on a continuing basis.

Timeline: by 1/94
Person Resp:
Resources:

Integration

1. Identify and compile a list of sites in California that are implementing "best practices" in integrating students with disabilities.

Timeline: by 12/92
Person Resp:
Resources: State Department of Education Implementation Sites

2. Review currently existing quality indicators of integrated programs and revise or adopt a set.

Timeline: by 12/92
Person Resp:
Resources: PEERS Implementation Site Criteria for Integrated programs

3. Determine which sites within the Riverside SELPA need to make changes in integration practices and identify what those changes should be: conduct site based needs assessments.

Timeline: by 1/93
Person Resp:
Resources: PEERS Integration Implementation Site Criteria

4. Identify, through the needs assessments, where classes for students with disabilities are "clustered" or on the perimeter of a campus.

Timeline: by 2/93
Person Resp:
Resources: SELPA program specialist and staff

5. Form site level teams to plan for better distribution and integration of these classes across a site. Set specific goals for these teams: e.g. teams will study best practices in integration, plan for staff training at the site, work with administration and facilities to work out a plan to move classes, put in place practices to facilitate real reciprocal interactions between students with and without disability labels, set timelines....

Timeline: by 2/93
Person Resp:
Resources:

Training and awareness all levels

1. Develop presentation on full inclusion/integration for the governance council: determine content, rationale for the content, resources for presenters and scheduling....

Timeline: by 10/92
Person Resp:
Resources: TRCCI state specialist
Interwork Institute at San Diego State University
Staff within Riverside SELPA already involved in full inclusion
Information from TASH/Cal-TASH
Current literature and research
Check State dept. of Ed. for other resources

2. Present information on full inclusion/integration to the governance council (based on work accomplished in goal #1).

Timeline: by 11/92
Person Resp:
Resources: (see goal #1)

3. Present information on full inclusion/integration to appropriate Boards of Education, including information on funding and flexibility of resources.

Timeline: throughout '92-'93 school year
Person Resp:
Resources: Use resources developed in goals 1 & 2

4. Develop parent training on full inclusion/integration: determine content, rationale for content, resources for trainers, scheduling....

Timeline: by 11/92
Person Resp:
Resources: (see goal #1)
PEAK Parent Center publication "Discover the Possibilities"

5. Present information on full inclusion/integration to parents through PTAs/PTCs.

Timeline: throughout the '92-'93 school year
Person Resp:
Resources: Use resources devloped in #4

6. Develop training for special education teachers and DIS personnel targeting best practices in inclusion/integration and targeting changing roles.

Timeline: by 11/92
Person Resp:
Resources: (see goal #1)

7. Provide training for administrators/general education teachers and DIS personnel, not included in previous trainings: target any information that would help them be prepared to educate students with disabilities in general education classrooms.

Timeline: as appropriate given progress in previous goals
Person Resp:
Resources: Previously identified resources
SEII instructors/courses

8. Begin to develop local training resources: specifically, make videos and take slides of actual inclusion/integration taking place in the Riverside SELPA Districts, including footage/pictures of students involved in academics (Math Their Way, whole language...).

Timeline: first semester '92
Person Resp:
Resources: Local staff

9a. Make contact with teacher training agencies (IHEs and conference/workshop presenters) to establish networking links to stay professionally updated and to advocate for the need to prepare all teachers to instruct all students.

9b. Participate as guest speakers/presenters in classes at state/local; conferences/workshops (Diversity Conference 1/93...) to provide "real world" perspective.

Timeline: continuing
Person Resp:
Resources: Local staff

10. Establish curriculum development teams/committees to work on infusion of ability awareness information into the existing curriculum (i.e. language arts, social studies, science...).

Timeline: '93-'94 school year
Person Resp:
Resources:

Deal with Related Services

1. Study the feasibility of
    - 1a. placing a CCS MTU in each zone,
    - 1b. having a van equipped to provide therapy at individual sites on an itinerant basis,
    - 1c. having mental health services in each zone,
    - 1d. providing individual and small groupcounselling at individual sites,
    - 1e. providing APE services on a cosultation/collaboration basis.

Consider administrative concerns, fiscal issues, staffing and training needs.

Timeline: by 1/94
Person Resp:
Resources: Riverside SELPA Zone Study
CCS staff
SELPA districts' DIS staff (PT, OT, APE, Sp.&Lang spec)
Model sites providing integrated therapy
Rainforth, York, and Macdonald. Collaborative Teams for Students with Severe Disabilities. Baltimore: Brookes, 1992.

2. Report, with recommendations for ways to deliver therapy services in full iclusion settings and on integrated sites.

Timeline: by 6/94
Person Resp:
Resources: (see goal #1)

3. Integrate specialized physical health care services into general education sites on an as needed basis. Be sure written guidelines covering procedures, including backup and emergency procedures, are in place in each case.*

Timeline: when needed
Person Resp:
Resources: California Guidelines ("The Green Book")

*Note: Guidelines can and should be written for the SELPA/Districts before there is an immediate need.

Service delivery and roles

1. Identify a method of providing services of SH personnel to general education staff who are including/integrating students with disabilities.
Timeline:
Person Resp:
Resources: see previous goals and following fiscal goals

2. Reevaluate the role of the SH specialist as it relates to full inclusion by examining various models of service delivery.
Timeline:
Person Resp:
Resources: (see previous goal)

3. Develop a continuum of roles for the SH specialist: provide an appropriate job description.
Timeline:
Person Resp:
Resources:

Fiscal issues

1. Identify cost implications (advantages or disadvantages) of full inclusion as opposed to separate programs.
Timeline:
Person Resp:
Resources:

2. Clarify with the state ways to fiscally support inclusion/integration of students labeled SH in a non-SH funded program.
Timeline:
Person Resp:
Resources:

3. Provide information to school district administrators re funding mechanisms and flexibility in using special education money to include all children in general education environments.
Timeline:
Person Resp:
Resources:

4. Establish a team/panel of experts trained in fiscal matters and flexibility of funding, distribution of units... to work with district Boards of Education to support full inclusion.
Timeline:
Person Resp:
Resources: the SELPA Governance Council

Appendix C

Implementation Site Criteria

PEERS

Providing Education for Everyone in Regular Schools

IMPLEMENTATION SITE CRITERIA FOR FULL INCLUSION PROGRAMS

1991

Ann T. Halvorsen, Ed.D
Tom Neary, M.A.
Lynn Smithey, M.A.

With Contributions from California Research Institute

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Sponsored by the California Department of Education, Special Education Division

IMPLEMENTATION SITE CRITERIA FOR FULL INCLUSION PROGRAMS

This tool is intended to assist in the identfication of schools providing quality inclusive educational programs for students with severe disabilities. It may also serve as a needs assessment tool for schools establishing inclusive education.

Please check as appropriate and comment as necessary.

I. Environmental Considerations

	yes	no	sometimes	comments
A. Facilities				
1. Students are included in age-appropriate(+/- 1 yr.) general education homerooms.	☐	☐	☐	
2. School is the one students would attend if non-disabled.	☐	☐	☐	
B. Student issues				
1. K-12 full inclusion programs have been established.	☐	☐	☐	
2. Students have the same school calendar and hours as their general education peers.	☐	☐	☐	
3. Identified special education student numbers are within natural proportion guidelines.	☐	☐	☐	

II. School Climate

	yes	no	sometimes	comments
A. Ownership				
1. Principal is *ultimately* responsible for implementation of the program, which includes supervision and evaluation of program staff.	☐	☐	☐	
2. There is a defined plan or process for supporting staff in implementation (ie. time for team planning meetings).	☐	☐	☐	
3. Ongoing site preparation or "ability awareness" occurs and/or is incorporated into general education curricula.	☐	☐	☐	

PEERS 1991

	yes	no	sometimes	comments
4. The school mission statement reflects a philosophy that every child can learn and considers the school to be accountable for serving all kids.	☐	☐	☐	
5. The school philosophy emphasizes responsiveness to families and support to meet family needs.	☐	☐	☐	
6. The school philosophy supports the need for staff inservice training on a regular basis.	☐	☐	☐	

III. Special education teacher inclusion

A. The special education teachers have responsibilities within the school to:

	yes	no	sometimes	comments
1. attend faculty meetings with general education staff.	☐	☐	☐	
2. participate in regular supervisory duties (eg. lunch/bus/yard duty).	☐	☐	☐	
3. participate in extracurricular responsibilities (eg. chaperone dances, work with student clubs).	☐	☐	☐	
4. follow school protocol: keep principal or appropriate administrator informed on an ongoing basis.	☐	☐	☐	

B. Special education teacher interaction includes:

	yes	no	sometimes	comments
1. positive public relations skills with general education staff.	☐	☐	☐	
2. taking lunch breaks and/or prep periods in the same areas as general education staff at least once a week.	☐	☐	☐	
3. arranging meetings with general education staff as necessary for maintaining communication with involved faculty.	☐	☐	☐	

C. Special education teacher modeling and instruction includes:	yes	no	sometimes	comments
1. consistently modeling positive attitudes towards and appropriate interactions with all students.	☐	☐	☐	
2. using age-appropriate terminology, tone or voice, praise/reinforcement with all students.	☐	☐	☐	
3. employing age-appropriate materials in instruction.	☐	☐	☐	
4. designing students' programs to include instruction of functional activities in many school and non-school settings.	☐	☐	☐	
5. implementing behavior management strategies that are positive and utilize natural cues/corrections to the maximum extent possible.	☐	☐	☐	
6. writing IEP objectives and individual programs to reflect interaction with nondisabled peers.	☐	☐	☐	
7. developing non-classroom environments in the school to be used for interactive functional activities for appropriate portions of the school day.	☐	☐	☐	

IV. General education classroom

A. General education classroom teacher:	yes	no	sometimes	comments
1. provides safe, orderly and positive learning environment for all students.	☐	☐	☐	
2. establishes high expectations for all students.	☐	☐	☐	
3. monitors student progress systematically.	☐	☐	☐	
4. participates as an IEP team member.	☐	☐	☐	

	yes	no	sometimes	comments
5. utilizes cooperative learning strategies.	☐	☐	☐	
6. utilizes multi-dimensional performance groups.	☐	☐	☐	
7. individualizes activities for students.	☐	☐	☐	
8. participates as a member of the school integration team.	☐	☐	☐	
9. collaborates with others in coordinating peer network/interaction systems.	☐	☐	☐	
10. encourages and supports friendship development for all students.	☐	☐	☐	
11. collaborates with parents/care providers.	☐	☐	☐	
12. collaborates with special education teacher and paraprofessional(s).	☐	☐	☐	
13. team teaches with special education teacher.	☐	☐	☐	
14. collaborates with special educator(s) to adapt learning objectives for students within the context of the core curriculum.	☐	☐	☐	
15. collaborates with special educator(s) to make material and environmental adaptations.	☐	☐	☐	
16. collaborates with special educator(s) to provide physical assistance as needed.	☐	☐	☐	
17. allows for alternative/substitute curriculum as appropriate.	☐	☐	☐	

V. Student integration

A. General school activities include:

	yes	no	sometimes	comments
1. Students have access to all school environments for programming and interactions.	☐	☐	☐	

		yes	no	sometimes	comments
2. Students participate in and are integrated for regular activities such as: (check activities)					
music	field trips	☐	☐	☐	
art	home ec.	☐	☐	☐	
library	work exper.	☐	☐	☐	
gym	recess/break	☐	☐	☐	
lunch	computer use	☐	☐	☐	
assemblies	regular class	☐	☐	☐	
clubs	other:	☐	☐	☐	
3. Students participate in grade level activities (eg. 8th grade dance, 6th grade camping trip, seniors' graduation).		☐	☐	☐	
B. Interaction with peers during the school day.					
1. Students' instructional programs incorporate interaction with general education students in the following areas (check all that apply):					
a. communication skills (within activities)		☐	☐	☐	
b. social skills (within activities)		☐	☐	☐	
c. community domain functional activities		☐	☐	☐	
d. vocational domain functional activities		☐	☐	☐	
e. recreation/leisure domain		☐	☐	☐	
f. home domain functional activities		☐	☐	☐	
g. other (specify):		☐	☐	☐	
2. Students are involved in regular structured interaction programs with age-appropriate nondisabled peers such as (check all that apply):					
a. peer tutoring in school and community		☐	☐	☐	
b. "PALS" (Partners at Lunch)		☐	☐	☐	
c. regular education class activities (list)		☐	☐	☐	
d. co-workers in job training		☐	☐	☐	

	yes	no	sometimes	comments
3. Strategies to support inclusion and foster friendships are employed (check all that apply):				
a. Maps	☐	☐	☐	
b. Circle of friends	☐	☐	☐	
c. Other (specify):	☐	☐	☐	
4. These interactive programs are:				
a. well organized	☐	☐	☐	
b. positive in orientation (emphasizing student strengths, focusing on functional activities)	☐	☐	☐	
c. well attended	☐	☐	☐	
d. supported by principal, faculty and parents	☐	☐	☐	
e. viewed as a positive experience by students	☐	☐	☐	
C. Ongoing provision of information				
1. General education students have received information about disabilities via (check all that apply):				
a. slide show presentation and discussion about the students	☐	☐	☐	
b. learning stations or simulations about learning disabilities	☐	☐	☐	
c. commercial media (films etc.)	☐	☐	☐	
d. guest speakers who have disabilities	☐	☐	☐	
e. disabilities unit within general education curricula, role playing, modeling and feedback from special education teacher regarding how to interact with or instruct specific students	☐	☐	☐	
f. specific training in systematic instructional techniques including data collection (peer tutors)	☐	☐	☐	
g. informal discussion/Q&A sessions with special education staff	☐	☐	☐	
h. other (specify):	☐	☐	☐	

	yes	no	sometimes	comments
D. Extracurricular activities				
1. Students with disabilities are involved in extracurricular activities associated with the school:				
a. clubs	☐	☐	☐	
b. dances	☐	☐	☐	
c. after school recreation/day care programs	☐	☐	☐	
d. scouts	☐	☐	☐	
e. other:	☐	☐	☐	
2. Students with disabilities currently have access to the following extracurricular activities: (list)	☐	☐	☐	

VI. Curricular and instructional model

	yes	no	sometimes	comments
A. The implementation site teacher:				
1. has organized each student's program according to the following domains:				
a. community	☐	☐	☐	
b. home	☐	☐	☐	
c. recreation/leisure	☐	☐	☐	
d. vocational	☐	☐	☐	
e. school	☐	☐	☐	
2. (regarding the domains listed above), emphasizes interaction with nondisabled peers within these activities.	☐	☐	☐	
3. has developed IEP objectives based upon the parent interview process.	☐	☐	☐	
4. plans activities using materials, instructional procedures and environments that are age-appropriate and individualized.	☐	☐	☐	
5. instructs all students in natural environments maintaining natural proportions.	☐	☐	☐	

Implementation Site Criteria for Full Inclusion Programs

	yes	no	sometimes	comments
6. completes functional assessments for all targeted activities.	☐	☐	☐	
7. involves related service staff in functional assessments in natural settings.	☐	☐	☐	
8. develops written instructional plans for each IEP objective.	☐	☐	☐	
9. works with related service personnel to provide integrated therapy services with nondisabled peers.	☐	☐	☐	
10. collects specific data to document student performance and to identify a need for program modification.	☐	☐	☐	
11. periodically probes for maintenance and generalization in the natural environment.	☐	☐	☐	
12. develops adaptations which are useful across environments to facilitate independence.	☐	☐	☐	
13. utilizes positive programming and other nonaversive strategies in behavior change programs.	☐	☐	☐	
14. assists families in accessing community resources.	☐	☐	☐	
15. initiates systematic planning to support transitions from one program to another.	☐	☐	☐	

Some of these items have been adapted from: Meyer,L.H.; Eichinger, J. & Park Lee, S. (1987). "A validation of program quality indicators in educational services for students with severe disabilities." JASH, 12,(4), 251-263.

The *Implementation Site Criteria* are utilized to identify potential sites to serve as internal demonstration sites. This tool is not meant to be used for for evaluation. Completion of these criteria should identify strengths and result in the identification of growth objectives.

Appendix D

Training Institute

PEERS

Providing Education for Everyone in Regular Schools

SCHOOL SITE TEAMS FOR INCLUSIVE EDUCATION

A TRAINING INSTITUTE

1992

Developed by
Ann Halvorsen, Ed.D
Tom Neary, M.A.
Suzanne Gilbert, M.A.
Susann Terry-Gage, M.A.

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A Statewide Systems Change Project for the Integration of Students with Severe Disabilities
Sponsored by the California Department of Education, Special Education Division

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December 1992

School Site Teams for Inclusive Education: A Training Institute

This training manual was developed through the PEERS Project as part of a five day training institute. In order to provide the best chance for inclusive education to be successful, only teams consisting of site administrators, general and special education teachers, parents and related service providers from school sites were selected to participate. This team approach provided the opportunity for all members to hear the same information, to work collaboratively together during the institute and to begin to build the relationships that are necessary for inclusive schools.

The training manual is organized in a straightforward manner. Each institute day is outlined with the following:

a. Session agenda
b. Trainer's notes- a basic script for trainers to follow.
c. Directions- information about how to arrange the room, the group and the activities.
d. Materials- a listing of materials, as they are used.
e. Overheads and Handouts- materials developed by PEERS or other projects to support the training.
f. Bibiliography- a listing of articles, books, resources that were helpful in designing the training.

We encourage you to gather your own slides, videos and examples, as your personal experiences are critical in assisting others to learn. They don't need to be perfect, just real.

Please feel free to duplicate our training materials. We would appreciate your citing the authors and PEERS, and are interested in any feedback you may wish to provide.

MATERIALS

Wall charts
Easels
Marking pens
Masking tape
Overhead projectors
Slide projector
Screens
Video player and monitor

Video tapes of students in classroom activities

Slides of students in integrated school and community environ.

Materials for modeling scenario

NCR action planning worksheets

Overheads (included)
Handouts (included)

Personal experiences

Energy

Commitment

PEERS

PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

PROJECT DIRECTOR
Patrick Campbell, Asst. Superintendent/Dir
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3567
(916) 657-5086 FAX

REGIONAL OFFICES
Tom Neary
650 Howe Avenue
Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D
Ed. Psychology Dept
CSU, Hayward
Hayward, CA 94542
(510) 881-3087 w
(415) 338-7849

Suzanne M. Gilbert
El Toro HS, Room 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8558
(714) 837-5066 FAX

Steve Johnson, Administrator
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2770
(916) 657-3256
(916) 657-5086 FAX

SCHOOL SITE TEAMS
DAY 1

OBJECTIVES

Participants will:

1. define essential practices for successful inclusion.
2. gain an understanding about the rationale for inclusive education.
3. develop a school mission statement.
4. assess the status of inclusion at the school site.
5. utilize cooperative learning strategies to become familiar with infused and additive approaches to ability awareness.
6. prioritize areas for team planning.
7. begin to develop team action plans.

AGENDA		page number
9:30	Introductions/group and individual needs	1
10:00	Defining inclusion/essential practices	4
10:35	BREAK	
10:50	Video: "Regular Lives"	6
11:35	Developing a school mission statement	7
12:00	Lunch	
1:00	Sharing of mission statements	7
1:15	School Site Team panel	8
2:00	Questions and discussion with site team	
2:30	BREAK	
2:45	Site needs assessment	9
3:15	Ability awareness via cooperative learning	11
4:00	Team planning time	12
5:00	Closing	13

Topic: Opening Introductions (30 minutes)

9:30 AM
DIRECTIONS

Participants should be sitting with their school site teams at small tables. Site teams should include both general and special education teaching staff, the site administrator, and a parent. Other members may include related services staff, (speech and language specialists, school psychologists, physical and occupational therapists etc.)

TRAINER'S NOTES

We'd like to welcome all of you to this week-long institute on inclusive schools. We've been very deliberate in our requirement that each participant be a member of a team for very good reason, because it's virtually impossible for inclusion to sustain unless there is support among staff at a school site. It may be possible for a student to be included because of the strong advocacy of a parent or special education teacher, or the openness and ability of one general education teacher, but in all likelihood, it will run into problems as staff change or as the inevitable challenges arise.

Session Agendas
on overhead

During this week, you'll receive a lot of information, you'll hear from a variety of people - parents, general and special education teachers, administrators and training staff, you'll be involved in role plays and exercises and you'll continually develop school site action plans, incorporating the information we cover.

It's often the expectation that the responsibility for the success of such an institute is on the trainers. It is true that it's our responsibility to offer a rich learning experience, it's also your responsibility to make sure your time is well spent. If you are here with the expectation that trainers will have all the i's dotted and the t's crossed about inclusion, you need to realize that no one has all the answers.

There are definite practices we will share that will promote and support inclusive education. We have enough experience with successful inclusive schools to know what seems to make it work for all students. But the key to success seems to be the belief that inclusion is right for all students. Since you're all here, it's our understanding that you do want to create inclusive education in your school.

Topic: Opening Introductions *(Continued)*

As we start this week, we'd like you to consider this thought:

Until one is committed, there is hesitancy,
The chance to draw back, always ineffectiveness.
Concerning all acts of initiative and creation
there is one elementary truth,
the ignorance of which kills countless ideas
and splendid plans.

The moment one definitely commits oneself
then providence moves, too.

All sorts of things occur to help one,
that never would otherwise have occurred.
A whole stream of events issues from the decision
Raising on one's favor all manner
of unforeseen incidents and meetings and
material assistance
which no one could have dreamt would have
come their way. (Johan Wolfgang von Goethe)

Are there any questions or thoughts before we begin?

We'd like to start by asking each of you to **introduce yourself, letting us know who you are, where you're from, what your role is on the team and telling us what you need to learn this week to make inclusion effective at your school.**

Overhead A.1:
Goethe quote

INCLUSIVE EDUCATION

Topic: Opening Introductions *(Continued)*

DIRECTIONS

Take notes on wall chart paper, hang it up and refer to these needs throughout the training. This information is also useful as a way to evaluate the institute with participants on the last day.

MATERIALS

Easel
Wall chart
Marking pens

INCLUSIVE EDUCATION

MATERIALS

Topic: Defining Inclusion/Essential Practices (20 min.)

10:00
TRAINER'S NOTES

As we begin this week of training it is important that we are certain that we are all using the same terms in the same way. So it is necessary that we attempt to define exactly what we mean by full inclusion. We offer the following definition:

> Full inclusion is a process through which general and special educators collaborate to provide instructional programming and special educational services to all students with disabilities as primary members of general education classes in their home schools.

The implications of the definition are many. Full inclusion means that students with disabilities, including students with severe disabilities, are primary members of general education classes full time--all day, every day. Special education services remain intact, as defined in the IEP. They are provided as support. The concept of support in providing fully inclusive schooling is critical. It is something that we must explore carefully in studying full inclusion.

Each of you has already been involved in inclusive efforts at some level. We should be able to generate as a group some of the practices that are critical to the success of inclusion. Many of those practices will be directly related to the support that must be provided in a fully inclusive situation. At this time, let's try to list as many critical practices as we can.

DIRECTIONS

Record each response on wall chart paper. Refer to the definition to clarify any comments that reflect misunderstanding of the definition provided.

Chart paper
Easel
Marking pens

MATERIALS

Topic: Essential Practices - Defining Inclusion (15 minutes)

10:20 AM
TRAINER'S NOTES

Your thoughts about what defines an effective inclusive education program are right on target. Let's keep in mind that although each child's education is individualized to his/ her needs and will look different than any other, there are several essential ingredients to *any* inclusive program. These guidelines were developed to summarize those practices that form a good foundation for inclusion.

DIRECTIONS

Show guidelines slides/overheads. Go over each point and relate it back to the practices they generated.

TRAINER'S NOTES

"A zero-exclusion philosophy is practiced." This means several things. First, a child's disability is never the determining factor for placement. In other words, the severity of her disability is not a reason to exclude a student. Often in the past, in spite of mandates to the contrary, students were "eyeballed" and assigned to special classes based on disabling condition or label. The Individuals with Disabilities Education Act (IDEA), PL101-476, states that the regular classroom is the setting of choice, with appropriate supports and aids, and only when this is demonstrated to be inappropriate, should another option be considered.

DIRECTIONS

Continue to review each point and connect their brainstormed statements to them.

TRAINER'S NOTES

We're going to be taking a break next. After the break we'll be viewing a videotape, "Regular Lives," which demonstrates many of these features, and which will give you a picture of both the rationale for, and outcomes of, inclusive education.

Overhead projector and/or slide projector

Easel and chart

PEERS Guidelines for Inclusive Education on overhead or on slides. Insert scenes of kids among graphic slides.

Guidelines as handout here also.

Inclusive Education Sites Sample (1992)

Topic: Essential Practices (45 minutes)

15 Minute Break

10:50 AM
TRAINER'S NOTES

This tape was filmed in the late 1980s in Syracuse, New York and developed by several consumer and advocacy groups in conjunction with public television, and has been shown throughout the world. The tape depicts inclusive settings from school to work to home for a variety of individuals.

DIRECTIONS

View and discuss "Regular Lives" (28 minute tape). Ask group for general comments afterward. Ask specific questions to stimulate discussion.

TRAINERS NOTES

(After tape) What did you think about the comments from general education students? How about the teachers? Did the physical education teacher have an understandable concern? What about the support teacher's response to that concern? What was your impression of the level of support students appeared to have in the classrooms?

As we mentioned, these schools and programs are located in the Syracuse, New York area, which has been one of the leaders in inclusive education. Next, we're going to do an activity in your school teams related to your school or district "Mission Statement." If you do not as yet have one developed, you may want to use the Syracuse public schools mission as a sample, or to compare with yours.

MATERIALS

VHS playback unit

Regular Lives videotape available through The Association for People with Severe Handicaps (TASH).

Chart and easel.

Topic: Developing a School Mission Statement (25 min.)

11:35
TRAINER'S NOTES

The attempt to fully include all students in general education classrooms has to rest on certain basic philosophical assumptions. These assumptions should be summed up in the school mission statement. At this time, we would like you to do some work as a team. We would like you to look at your current school mission statement and reevaluate it. Does it reflect fully inclusive values? If so, fine. If not, take some time to rewrite it. To help you do this, we are providing the Schools Are For All Kids (SAFAK) Mission Statement activity. Follow the SAFAK guidelines to help you come up with a new mission statement. If you have time, you might also want to discuss how closely school practices do, if fact, reflect the school mission statement.

DIRECTIONS

Participants should be sitting as school site teams. Provide the SAFAK Mission Statement activity materials to each team. Allow the next 25 minutes for teams to work with trainers rotating around to clarify the activity and/or offer assistance if requested. Team members should select someone to record.

12:00
LUNCH BREAK

1:00
DIRECTIONS

After the lunch break, have participating teams share their mission statement.

MATERIALS

New York State Partnershipfor Statewide Systems Change: Inclusive Education Quality Indicators

New Mexico State Dept. of Education Vision Statement.

SAFAK Mission statement activity materials(Roger, B. Gorevin, R. Fellows, M. & Kelly, D. 1991)

Topic: School Site Team Panel Presentation (75 minutes)

1:15 PM
DIRECTIONS

Trainers should arrange in advance to bring in an existing school site team on the first day to share their experiences with inclusion. The team should exemplify the collaborative practices which are a major focus of the workshop, and should be composed of at least the following: general education administrator (school site principal), general education teacher, special education inclusion facilitator, and parent. Four panelists would usually be the maximum number for this amount of time. Encourage presenters to bring slides, videotapes, and handouts related to their inclusive program. It's a good idea to provide the team with a framework for their discussion, i.e., a series of questions related to the origin, structure and day to day workings of the program, as well as outcomes for students. Another area that would be important for the team to emphasize is the collaborative aspect of their team process, role changes, shared roles, etc.

After introducing the team, provide 45-60 minutes for their formal presentation, with the remaining time (15-30 minutes) available for questions.

2:30
BREAK

INCLUSIVE EDUCATION

Topic: Site Needs Assessment (30 minutes)

2:45 PM
DIRECTIONS

Hand out copies of #1 and #2 to each participant, and two copies of #3 to each team.

TRAINER'S NOTES

You've had the opportunity today to review essential inclusive practices, to see a tape about inclusive schools, to examine your mission, and to hear from a school team where inclusion is now a working option for students with severe disabilities. We'd like you now to have an opportunity as a team to begin considering and assessing your school site, and where you need to go to make inclusion a reality. The first handout consists of the PEERS Project's criteria for sites implementing inclusion, developed in conjunction with the California Research Institute at San Francisco State University. PEERS has used these criteria as a needs assessment to assist in evaluating and planning, and to develop growth plans for existing programs. Let's take a few minutes as a team to begin going through these items, and decide where your priority areas are. You'll want to designate *roles* for each of your team members in this process; such as *recorder, reporter, facilitator, timekeeper, "jargon buster" encourager*, etc. You may wish to rotate these roles throughout the week to maximize everyone's participation. At the end of each day's training, we encourage you to continue your discussions over dinner or in the evenings, to ensure that you have a well-designed plan of action by week's end.

The second handout, developed by CRI, is a needs assessment related to *school restructuring*. As you have heard from the team who presented today, inclusive education does not exist in a vacuum from the rest of the school community. Rather, it needs to be integrated within the total school plans for ongoing improvement and reform. An excellent resource on this, which formed the basis for this restructuring needs assessment, is Wayne Sailor's 1991" Special Education in the Restructured School" (Remedial & Special Education, 12 (6), 8-22). We encourage you to consider these items on restructuring as you undertake your needs assessment process.

As you begin to identify priority areas for your team, you can utilize the third handout *Team Action Plan* to delineate those goals and objectives, timelines and resources required. We'll be moving among you during planning time each day to assist you with this process.

MATERIALS

Handouts:

1. PEERS/CRI (1991) Implementation Site Criteria.

2. California Research Institute (CRI) Restructuring Needs Assessment.

3. PEERS team action plan form on NCR paper.

4. Colusa High School Full Inclusion Plan 1990-91. Colusa, Calif.

Optional:

Easels, markers, chart paper for each team.

MATERIALS

Topic: Site Needs Assessment (cont.) (30 minutes)

Let's take 20 minutes now to begin your discussion, until 3:15. At 4:00, after our final training activity, you'll have a chance to continue this process. We'll be reporting on the process each morning this week.

DIRECTIONS

Trainers rotate among groups to observe and facilitate initial needs assessment discussion.

Topic: Ability Awareness Education (45 minutes)

3:15 PM
DIRECTIONS

The trainer will introduce the activity as described below, using the directions on overhead. Expert groups will work independently and trainers may rotate among them. Each of the four expert groups should have the material that pertains only to their section and become familiar with this. They will then bring their knowledge back to their home group where they will do a "jigsaw" to discuss how the four pieces fit together. This promotes positive interdependence, a primary feature of cooperative learning.

TRAINER'S NOTES

This activity is designed for use as a cooperative learning jigsaw. How many of you have done jigsaws before? The purpose of this activity is to provide *adults* with information about *ability awareness education*, or the provision of accurate information regarding people with disabilities to audiences of nondisabled persons. This material is divided into four sections.

DIRECTIONS

The facilitator identifies four "home groups" (school teams) and four "expert groups" (representatives from each team). Each home group counts off 1-4 with repeats as needed, and each member goes to the expert group which corresponds to their number. Expert groups read and discuss their group's materials for a set period of time (10 minutes suggested). They then return to their home groups to present this material to the other members. Each expert spends about five minutes presenting their material, for a total of 20 minutes. At this point, the facilitator brings everyone back to the large group, and asks groups to discuss issues presented in the material such as the infusion of ability awareness into general education curricula versus an additive approach. In approximately 45 minutes a great deal of information has been shared, two types of teams have had opportunities to work together, and an exciting learning strategy has been utilized.

This activity could be followed at another time with opportunities for practice and/or planning of ability awareness strategies by home teams to take back to their local schools or programs.

MATERIALS

Overhead projector and screen.

Ability awareness overhead with activity direction.

Packets of handouts for jigsaw activity (4 sections).

MATERIALS

Topic: Team Planning Time (60 min.)

4:00 PM

TRAINER'S NOTES

We've had the opportunity to identify best practices in inclusive schools through the *PEERS Full Inclusion Guidelines* which you have. We've also discussed the practices evident in *Regular Lives* and you've had the opportunity to hear from a school site team that is currently implementing inclusion.

Each team has begun to develop a site mission statement reflecting your beliefs.

You've been provided with the *Implementation Site Criteria for Full Inclusion Sites*, developed through this project and the *Restructuring Needs Assessment*, developed by the California Research Institute on the Integration of Students with Severe Disabilities (CRI).

Finally, we've examined *ability awareness* in a cooperative learning approach.

At this time, we'd like you to meet as a school site team for the next hour to do team planning. Use the information provided throughout this day to:

1. Assess the current status of your site with the tools provided:
    a. PEERS Full Inclusion Guidelines
    b. Your draft school mission statement
    c. Implementation Site Criteria for Full Inclusion Sites
    d. Restructuring Needs Assessment
2. Consider the experiences of the educators and families discussed in *Regular Lives* and from the School Site Team that presented today to set your priorities for planning for this week.

We have NCR action planning sheets for you to use as you plan. Please designate someone to record your plans and be prepared to share those beginning plans in the morning. It will be helpful to identify someone as a timekeeper and someone to keep the discussion moving.

Full inclusion guidelines

Draft mission statements from each site team

Implementation site criteria

Restructuring needs assessment

Wall chart with these two tasks noted:
1. Assess status
2. Prioritize

NCR action plan worksheets

INCLUSIVE EDUCATION

Topic: Team Planning Time *(Continued)*

You may stay in the room, go outside to plan or go to your hotel rooms if that is more comfortable.

We'll be available to meet with your team if you'd like. If not, we'll see you at 8:30 tomorrow morning.

DIRECTIONS

Training staff should move around from group to group to help the teams get started in their planning. Encourage the team to select facilitator, recorder and timekeeper roles and to focus on examining their site for the current status of inclusion and setting the most important goals for the week.

MATERIALS

- Wall charts
- Pens
- Tape
- Note paper

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PEERS

PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

PROJECT DIRECTOR

Patrick Campbell, Asst. Superintendent/Dir.
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3567
(916) 657-5086 FAX

REGIONAL OFFICES

Tom Neary
650 Howe Avenue
Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D.
Ed. Psychology Dept.
CSU, Hayward
Hayward, CA 94542
(510) 881-3087 or
(415) 338-7849

[illegible] M. Gilbert
El Toro HS, Room 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8556
(714) 837-5066 FAX

Steve Johnson, Administrator
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3256
(916) 657-5086 FAX

DRAFT

Inclusive Education/Supported Education

The following characteristics are indicators of fully inclusive programs for students with disabilities. They are meant as guidelines in planning for inclusion and also as a means for maintaining the integrity of the term, Inclusive or Supported Education.

1. Students are members of chronologically age-appropriate general education classrooms in their normal schools of attendance, or in magnet schools or schools of choice when these options exist for students without disabilities.

2. Students move with peers to subsequent grades in school.

3. No special class exists except as a place for enrichment activities for all students.

4. Disability type or severity of disability does not preclude involvement in full inclusion programs.

5. The special education and general education teachers collaborate to ensure:
    a. the student's natural participation as a regular member of the class
    b. the systematic instruction of the student's IEP objectives
    c. the adaptation of core curriculum and/or materials to facilitate student participation and learning.

6. Effective instructional strategies (eg. cooperative learning, activity-based instruction, whole language) are supported and encouraged in the general education classroom.

7. The staff to student ratio for an itinerant special education teacher is equivalent to the special class ratio and aide support is at least the level it would be in a special class.

8. Supplemental instructional services (eg. communication, mobility, adapted P.E.) are provided to students in classrooms and community settings through a transdisciplinary team approach.

9. Regularly scheduled collaborative planning meetings are held with general education staff, special education staff, parents and related-service staff in attendance as indicated, in order to support initial and ongoing program development and monitoring.

DRAFT

Inclusive Education/Supported Education

10. There is always a certificated employee (special education teacher, resource specialist or other) assigned to supervise and assist any classified staff (eg. paraprofessional) working with specific students in general education classrooms.

11. Special education students who are fully included are considered a part of the total class count for class size purposes. In other words, even when a student is not counted for general education ADA, s/he is not an "extra" student above the contractual class size.

12. General ability awareness is provided to staff, students and parents at the school site through formal or informal means, on an individualized basis. This is most effective when ability awareness is incorporated within general education curriculum.

13. Plans exist for transition of students to next classes and schools of attendance in inclusive situations.

14. Districts and SELPAs obtain any necessary waivers of the Education Code to implement supported education.

15. Supported education efforts are coordinated with school restructuring at the district and site level.

In summary, all students are members of the general education classroom, with some students requiring varying levels of support from special education. Hence the term "Supported Education". This term, though synonymous with "Full Inclusion", is explicit in acknowledging the importance of providing support services within the regular classroom, when necessary, to ensure a quality educational program.

PEERS 1992
With appreciation to Dr. Wayne Sailor, "Special Education in the Restructured School" Remedial and Special Education, *12, 6* (1991).

PEERS

Providing Education for Everyone in Regular Schools

PROJECT DIRECTOR

Patrick Campbell, Asst. Superintendent/Dir.
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 323-4768

REGIONAL OFFICES

Tom Neary
650 Howe Avenue, Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D
Ed. Psychology Dept.
CSU, Hayward
Hayward, CA 94542
(415) 881-3087 or 338-7849

Lynn [illegible]
El Toro HS, Rm. 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8551

Steve Johnson, Consultant
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 323-4871

PEERS PROJECT

INCLUSIVE EDUCATION

SITES SAMPLE

Ann Halvorsen
Tom Neary
PEERS Coordinators
Fall, 1991

A Statewide Systems Change Project for the Integration of Students with Severe Disabilities   Sponsored by California Department of Education, Special Education Division

Peers Project
Fall 1991

I. Rural Programs

A. **Lassen County**: Michael Justice, Special Education Local Plan Area (SELPA)Director(916)257-2196

- Structure and Staffing of Model: County office of education operates inclusion program collaboratively with the district in Susanville, a town in the Sierras. Twenty-two elementary aged students with moderate to severe disabilities are currently involved at McKinley School. When the second elementary school is completed, about half of the students will go to this new home school and be included there. A waiver of one Education Code section was applied for and approved by the State Board of Education so that staff and funds typically allotted for special education classes (teacher and 1 - 2 paraprofessionals) can be utilized in an itinerant manner within general education. There are no isolated sites or centers in Lassen County.

B. **Colusa County**: Debra Owens, SELPA Director, (916) 458-8891

Structure of Model - This rural county in North Central California has four towns: Colusa, Williams, Maxwell and Arbuckle. Currently within Colusa and Williams the inclusive programs are: 1) a collaborative preschool program with a local private preschool attended by disabled and nondisabled students and team taught by general/ special preschool educators, 2) two elementary schools serving students within their age and grade - appropriate classes in their respective home schools, 3) one middle and one high school program with students in their age and grade appropriate classes with additional instructional program time in the community and at integrated vocational training sites. There are no isolated sites or centers in Colusa County.E

- Staffing: Colusa County Office of education also operates this model in collaboration with the local districts, for approximately 25 students across age levels. Teachers are encouraged to obtain dual credentials (e.g. LH/ SH as well as the state required general education credentials) so that they feel competent to provide support services to a non-categorical mix of students at the home school. The SELPA also obtained a waiver in order to support students in general education classes. The SELPA reports that inclusive education is operating at no greater cost over a special class model.

II. Suburban

A. **Davis U.S.D / Yolo County Office of Education**: Nona Kirk, SELPA Director, (916) 661-2935 or Tom Kearns, C.O.E. Special Education Director,(916)661-8710

- Structure and Staffing: Davis is a university community near Sacramento, whose school - age students with severe disabilities had attended a segregated center in another town until 1989. Ten Davis students now attend their three respective home schools and are served in age and grade - appropriate kindergartens - sixth grades. Three staff (teacher and two paraprofessionals) work in an itinerant manner (under a waiver) among the various classes, providing support services such as curriculum adaptation, facilitating instruction, teaching groups, etc. Davis also has a university preschool which fully includes students who experience disabilities.

B. **Napa Unified School District**: Nancy Reinke, Program Administrator (707) 253-6865.

- Structure and Staffing: The rural/ suburban community of Napa has no isolated sites; all students attend district schools. This Fall an inclusive model was initiated which involves a team - taught morning kindergartenin one school (24 general) education and four students with special needs) and additional 1st - 5th grade students in other home schools. The program currently serves a total of five students, with a goal of at least two more by year's end, and a full "class load" of 9 or 10 by next school year. The teacher and two aides also function in an itinerant manner, with one always present in the kindergarten. The appropriate waivers were also obtained. Napa U.S. D. is very interested in coordinating their inclusion efforts with the current restructuring/ general education focus in the district, and potential state grants to support these efforts. Presently, the inclusive program is operating at the same cost as a special class program.

C. **San Lorenzo Valley U.S.D**: Catherine Gallegos, Director of Special Education,(408)335-4717

- Structure: The Santa Cruz County Office of Education operates this program collaboratively with the district in this mountain community north of Santa Cruz. Two elementary schools are now serving six students from kindergarten through second grade, with one teacher and three paraprofessionals - two of these are about half time (3 1/2 hrs) and one is full time (6 hours). They expect to expand this program to include more elementary and secondary aged students in the next year.

III. Urban Programs:

A. **Oakland Unified School District**: Vivian Lura, Director of Special Education, (510) 836-8223.
Alternative contact: Lynne Ono, Elementary Program Manager, (510) 836-8220

- Background: Oakland is a large urban district across the Bay from San Francisco, with about 100 schools. Until Fall, 1988, all students with moderate to severe disabilities were served in one of three special centers. Two of these have been closed in the past two years; the third has several elementary classes in it and is administered by the elementary principal in the adjacent school. There are about 50 integrated programs for students from preschool through transition age. The public Child Development Center preschool program for financially eligible students has had multiple integrated and team taught sites for two years; Headstart and the district have initiated four full inclusion programs this year, and there are three schools with integrated team-taught kindergartens. In addition, elementary and middle school inclusive education began this year.

- Structure: One elementary school (Allendale Year Round) which has one of the team - taught kindergarten programs, expanded to include kindergarten-3rd grade students this year. Five new students now attend their grade and age - appropriate classes in their home school with support from a teacher and two aides, and with expansion planned to more students in the future.

ACTIVITY
A MISSION FOR OUR SCHOOL COMMUNITY

1. As a group write one sentence which describes your vision of full inclusion in your school community.

2. If your school has a mission statement write it here.

3. How does your current mission statement indicate respect and acceptance for children with disabilities as equal and productive members of the school community? Does it coincide with your vision?

4. Take a few minutes to begin a conversation which you can bring to completion at your school site on the Mission Statement you would like for your school community.

Sample of District Mission Statement

Strategic Plan Draft
Syracuse City School district
1991-1996

Mission Statement

The mission of the Syracuse City School district is to ensure that all students demonstrate master of defined skills and knowledge, appreciation of diversity, and development of character, which will enable them to become productive, responsible citizens who can succeed in a rapidly changing world; this is accomplished, in partnership with our community, by transforming our educational system to respond to the unique needs of each student through excellence in teaching and learning.

Objectives

- All students will demonstrate mastery of essential learner outcomes as determined by the district's standards of excellence.
- By 1996, all children at grades 3 and 6 will perform at or above the statewide reference point on the Pupil Evaluation Program test .
- By 1996, the percentage of students finishing in the 90th percentile on the Pupil Evaluation Program test at grades 3 and 6 will double.
- By June, 1996 the graduation rate will increase by 25%.

Black, J & Meyer, L. (1991). Sample of District Mission Statement. Syracuse, NY: Syracuse University, The New York Partnership for Statewide System's Change.

A Checklist on District Philosophy: The Inclusion of Students with Disabilities

Is there an official, written mission statement, philosophy, or statement of beliefs for the district? ______yes ______no

If yes, are the following features reflected in that statement:

No Evidence   Paritally Dev.   Clear Commitment

___ ___ ___ 1. Every student can learn.

___ ___ ___ 2. The purpose of schooling is to support student master of the essential skills and knowledge needed to make a meaningful contribution to society.

___ ___ ___ 3. Schools have a responsibility to insure that each student has access to mastery of meaningful outcomes through individualized adaptations and accommodations to diverse learning styles and needs.

___ ___ ___ 4. Schools must accept responsibility to prepare all students to thrive in a pluralistic and multicultural society through the incorporation of culturally diverse method and content across the school years.

___ ___ ___ 5. Home-school collaboration is a valued component of the educational experience for students.

___ ___ ___ 6. Schools must support the development of a positive self-concept in every student irrespective of background or personal characteristics.

___ ___ ___ 7. Schools must prepare children to interact positively with one another and with all members of their community regardless of gender, socioeconomic status, religion, ethnicity, or cultural identity.

___ ___ ___ 8. Members of the school community must accept responsibility for the full inclusion, achievement, and personal growth of all children entitled to enrollment in that school.

___ ___ ___ 9. Education is the shared responsibility of the school, family, and neighboring community.

___ ___ ___ 10. The school district and each individual building are accountable to the public.

Beliefs

We believe:

- Children are our community's most valuable asset.
- All children can succeed in learning.
- Every individual has inherent worth.
- Children learn at different rates and in different ways.
- Our democratic form of government thrives upon an educated citizenry.
- Parents bear primary responsibility for the welfare and development of their children.
- The diversity of our people strengthens our community.
- Excellence in learning is directly related to excellence in teaching.
- Life-long learning is essential to success in a changing society.
- The school district is accountable to the public.
- Understanding and appreciation of cultural diversity are critical to world peace and harmony.
- Education is the shared responsibility of the school, student, family, government, and the entire community.
- A core of common values and ethical conduct are fundamental to sustaining our society.
- Self-esteem is directly related to success.

(Draft 11/91)

New York State Partnership for Statewide Systems Change

INCLUSIVE EDUCATION QUALITY INDICATORS

District Level

1. The district mission statement includes:

   ___ appreciation for diversity
   ___ statement that all children can learn
   ___ commitment to varied instruction to meet the needs of all children
   ___ commitment to students attending "home" schools (the school they would attend if they did not have a disability)
   ___ commitment to inclusion of students with disabilities in regular classrooms

2. Specific goals and timelines are specified for extending quality inclusive Schooling to students with severe disabilities in their home schools at all levels.

3. A district wide staff development plan is designed to increase positive attitudes and technical skills of staff to implement quality inclusive schooling for all students, including students with severe disabilities.

4. Special and regular education resources and personnel are integrated within the mainstream of educational services at the district and building levels.

Building/Classroom Level

5. Students with severe disabilities are valued members of their school community.

6. Special education and regular education personnel serve together on grade/age level teams.

7. Special and regular education personnel demonstrate proficiency in teaming and collaborative planning to meet individual student needs in regular schools and classrooms.

8. Students with severe disabilities participate in enrichment activities and environments (e.g., computer labs, library, media center, etc.) with same-age peers.

9. Students with severe disabilities begin and end their school day (or spend their "homeroom"period) in a regular classroom or homeroom appropriate for their age.

Black, J. & Meyer, L. (1991). Inclusive Education Quality Indicators. Syracuse, NY: Syracuse University, The New York Partnership for Statewide Systems Change.

10. Students with severe disabilities participate in "special area" classes (e.g., physical education, home economics, industrial arts/technology, music, art, etc.) with same-age peers where they work on IEP goals and objectives.

11. Students with severe disabilities participate in academic classes (e.g., math, science, reading/language arts, social studies/history/geography, etc...).with same-age peers where they work on IEP goals and objectives.

12. Lesson planning and classroom organization provide meaningful participation for students with severe disabilities within regular education classrooms through the use of:

    ___ individualized adaptations
    ___ "multi-level curriculum" strategies
    ___ "curricular overlapping" strategies.

13. Extra-curricular and after-school activities include students with severe disabilities according to their interests.

14. Parents are viewed as fully participating members of the educational team on behalf of their individual children.

Student Level

15. Students with severe disabilities' IEPs (are):

    ___ individualized
    ___ reflect the priority needs of the student
    ___ age-appropriate
    ___ specify "natural contexts" for instruction
    ___ specify appropriate criterion for mastery
    ___ focus on social, motor, and communication skills within the context of meaningful activities (embedded skills instruction)
    ___ include "community-referenced" instruction when appropriate
    ___ include at least one objective focused on interactions with nondisabled peers

16. Friendships between students with and without severe disabilities are through activities designed to structure, support, and encourage such peer interactions.

17. "Challenging behaviors" of students are addressed using a positive, non-aversive, skill building, and problem-solving approach.

18. Related services are provided to students according to individual needs as specified on the IEP using an Integrated Therapy approach.

ATTAINING IEP GOALS/OBJECTIVES IN REGULAR EDUCATION

1. LEARNING SOCIAL-COMMUNICATIVE COMPETENCIES THROUGH PEER INTERACTIONS

Examples:

- o Practice Age-Appropriate Social Skills (Turn-Taking, Sharing, Helping, Raising Hand)
- o Indicate Choice of Materials in Reading
- o Give Praise as Part of a Cooperative Learning Group Activity in Science
- o Make Friends

2. PARTICIPATING IN COMMON COMPONENTS OF ROUTINES

Examples:

- o Participate in Homeroom Routines (Attendance, Pledge...)
- o Anticipate Transitions Between Activities and Classes
- o Increase Mobility Skills by Moving Between Activities
- o Anticipate Ending/Termination of Class Period

3. LEARNING LIFE-LONG FUNCTIONAL SKILLS

Examples:

- o Functional Academic Math (Calculator in Math Class)
- o Functional Academic Reading/Writing Skills (Interpreting Picture Symbols and Using a Communication Booklet in Reading Class)
- o Food Preparation (Microwave, Blender, Toaster) in Home Economics
- o Vocational Skills Through Work-Study Placement with Typical Peers

4. LEARNING REGULAR EDUCATION CONTENT

Examples:

- o Receptive Language Skills in Whole Language Reading Activity
- o Calendar Skills (1st Grade Class)
- o Aesthetic Appreaciation in Art or Music
- o Plant Growth in Elementary Science
- o Letter/Journal Writing (Pictures or Words) in Secondary English
- o Computer Literacy in Math Lab

Adapted From York, Vandercook, Caughey, & Heise-Neff (1988)

NEW YORK PARTNERSHIP FOR STATE-WIDE SYSTEMS CHANGE

DISTRICT MISSION STATEMENT FOR INCLUSION
ACTIVITY DIRECTIONS

STEP 1: Within your District Task Force, decide on roles within the group.

STEP 2: Complete the District's Activity Demographic Summary

STEP 3: Mission Statement Evaluation & Revision

If your District has a mission statement, you'll focus the activity on yours. If not, agree as a group to use the Syracuse draft example. Verbally review the task and the materials.

Review and complete the information requested on items #1, 2, and 3 of the Evaluation Activity.

Choose one or two missing dimensions and draft a revision portion to the district philosophy to better reflect inclusion (item #4).

Complete item #5 of the Evaluation Activity.

STEP 4: Observer completes the Process Summary Sheet of group reviews.

STEP 5: Recorder/Reporter prepares to report to the large group. Hand in your group's complete packet to the workshop leaders.

STEP 1: SELECT ROLES

Direction Giver/Checker:	Make sure everyone in the group understands the task (verbally review!).
Facilitator/Timekeeper:	Keep the group informed of the time by tasks that need to be done (provide prompts!).
Informant:	Serves as a source of information on the Districts Mission Statement & similar documents (clarify for everyone).
Recorder/Reporter:	Completes top portion of the worksheet. Writes down the group's decisions and edits the group report (review with your group!).
Encourager:	Reinforces contributions from all group members (Also, invites contributions).
Observer(s):	Keeps track of how well the group is collaborating; and completes Process Summary. (Review summary with the group!)

Roles	Who?	Your Position/Role in District
Direction Giver/ Checker		
Faciliator/ Timekeeper		
Informant		
Recorder/ Reporter		
Encourager		
Observer		
Other Observer		
Other Observer		

DAY 1 HO

STEP 2: DEMOGRAPHIC SUMMARY

District ______________________________

Contact Person ______________________________

Mailing Address ______________________________

____

____

Phone (______)______________________

Briefly describe your district...

Estimated size of total student population:

Estimated size of special education enrollment:

Estimated size of special education population with severe disabilities:

Where are students with severe disabilities served?

Attach your District's Mission Statement:

___ Attached
___ Not Available
___ None Exists

STEP 3: MISSION STATEMENT EVALUATION & REVISION

Does my district philosophy support inclusion?

1. Compare either your own district's philosophy or the sample provided on each of the 10 inclusion dimensions (Did you evaluate: _______ my district, or _______ the sample). List below, by number, those dimensions reflected in the written statement with a clear commitment:

   Dimension # Corresponding Written Statement

2. Now compare that written statement with the 10 inclusion dimensions which you believe are partially developed:

   Dimension # Corresponding Written Statement

3. Finally, list below those dimensions that are not evidenced in the written statement.

   Dimension # Corresponding Written Statement

4. As a group, select one or more of the missing dimensions and suggest revisions to the district philosophy that would better reflect inclusion.

5. Finally, within your group, brainstorm a process and specific strategies for attaining district support for making revisions to the existing statement to better reflect inclusion.

   Remember, any changes to the district mission statement must have the full support of districts constituents--teachers, administrators, support personnel, the Board of Education, parents, and the zone community. You may also wish to elicit student support!

Who must be convinced	Strategies to accomplish changes

NEW MEXICO STATE DEPARTMENT OF EDUCATION

VISION STATEMENT

The New Mexico State Department of Education believes the education of all students must become the mission of all New Mexicans. We believe education must challenge all students to reach their potential.

ADMINISTRATIVE POLICY ON FULL INCLUSION

The New Mexico State Department of Education believes that all students must be educated in school environments which fully include rather than exclude them. School environments include all curricular, co-curricular and extra-curricular programs and activities.

Full inclusion means that all children must be educated in supported, heterogeneous, age-appropriate, natural, child-focused classroom, school and community environments for the purpose of preparing them for full participation in our diverse and integrated society. The New Mexico State of Education supports, encourages and will facilitate emerging local practices and creative utilization of resources which address the full inclusion of all children in the local school and community.

CURRENT PRACTICE

The current practice in many American public schools evolved as a response to the growing diversity of the American public school population and the need to more effectively attend to the individual, diverse needs of these learners. Current practices also developed as the American public and the educational community began to fully comprehend the full meaning of a free appropriate public education for everyone. Diversity in instructional practice and variety in educational service delivery became important elements in an educational system to meet the challenge of an education for all. At the time, practices which emerged revolutionized the role of the public school in American society. We are now re-examining these practices, reassessing the values associated with these practices and reflecting on the role current practices play in limiting the vision of an education for everyone.

Historically, much of educational practice and instructional delivery has been based on the premise that a typical, homogeneous group of children exists within the school population. A central belief to this practice is that this typical group of children learn in similar ways and will achieve at similar rates. A corollary to this practice is the assumption that some typical children will attain a satisfactory level of achievement in response to a standard set of teaching practices. Whereas, atypical children are assumed to require a radically different set of teaching practices which can only be provided by specially trained teachers in specialized settings.

The typical-atypical paradigm has further evolved into a belief that atypical children are actually dysfunctional children and that dysfunctional children should be separated from their peers for their mutual benefit. Systems of exclusionary grouping also have reenforced the misguided belief that it is possible to identify enough atypical groups to accommodate the variety of atypical children that go to school. The typical-atypical paradigm has been further exacerbated by differentiated instructional, training and auditing practices within categorical programs designed to meet the needs of the atypical child, i.e. Chapter I, special education and bilingual education programs.

Beliefs associated with the typical-atypical paradigm have led to the adoption of a number of exclusionary practices. Examples of such practices include: ability grouping, tracking, pull-out programs, special classrooms and schools, competitive learning environments and labeling.

OUTCOMES OF CURRENT PRACTICE

The central responsibility of teachers and schools within the typical-atypical paradigm is to find the dysfunctional children and arrange for someone else to educate them. The process of finding and excluding atypical children fundamentally alters beliefs about what can be expected from all children. Inability of children to measure up to an arbitrary and subjective idea of what is typical communicates to the child and others that the child is unable to perform and that something less is expected from that child. Lowered expectations for the atypical child contribute significantly to the rising drop-out rate, low self-esteem among many learners and reduced achievement as compared to potential. Additional outcomes to exclusionary practices are predetermination of educational and posteducational opportunities, reduced educational benefit for many learners, inability of learners to perform successfully in diverse, integrated employment and social settings, and cultural and ethnic resegregation.

A VISION OF FULL INCLUSION

Full inclusion means that all children are educated in supported, heterogeneous, age-appropriate, dynamic, natural, child-focused, classroom, school and community environments. The vision of full inclusion is based on the belief that every person has the right and the dignity to achieve his potential within the vast and varied community of society. Full inclusion means open doors, accessibility, proximity, friends, support, right of association, values and diversity. Full inclusion means attending one's school of choice, attending classes with same-aged peers and participating in school and community activities which maximize the social development of everyone.

An integral correlate to full inclusion and achievement is high expectations of all learners. All members of the fully inclusive school support the belief that all students can learn and that friendship is a desired school outcome. Everyone in the school is committed to these beliefs and strives to create a community of learners and friends. A school which practices full inclusion takes responsibility for the learning of all its members. Fully inclusive schools promote a climate and community of learning characterized by high expectations for everyone. Each student is expected to be a successful learner and establish friendships.

In a fully inclusive community of learners, everyone learns cooperatively as well as competitively. Schools are both places of learning and social institutions. A fully inclusive school values friendships and diversity as significant outcomes to schooling. Fully inclusive, heterogeneous, cooperative learning environments benefit all learners in several ways. Skills and values essential to successful participation in a diverse, integrated society are acquired during an individual's time in school. People in a full inclusion school respect and value diversity and interdependence. Learners recognize that regardless of an individual's talents and limitations everyone has a role and everyone can contribute to one another's learning and growth. The school and community members in a fully inclusive school believe each person brings something of value to the school. A school which fully includes all members of the school community fosters interdependence as a value and teaches the skills necessary to bring out the best in everyone. Success is rarely the accomplishment of one individual alone. Full inclusion through circles of support and friendship nourishes success through interdependence and collaboration.

STRATEGIES SUPPORTING FULL INCLUSION

Because the New Mexico State Department of Education supports full inclusion, each school in New Mexico is challenged to adopt and implement practices which promote full inclusion. The New Mexico State Department of Education recognizes that the values and beliefs associated with full inclusion cannot be mandated. Consequently, it is the administrative policy of the New Mexico State Department of Education to support, influence, encourage, suggest and guide the local efforts of schools to evaluate and assess its values and beliefs about learning, children and the school.

A school which embarks on a mission to determine if its practices serve its values and as schools begin to adopt practices and strategies which support full inclusion, each member of the school community will become aware of the need to reevaluate his role and relationship to other members. The school climate in a fully inclusive school emphasizes collaborative, collegial networks of learners, professionals, families and communities.

When grouping learners, a full inclusion school clusters students heterogeneously and age-appropriately. Students in a full inclusion school attend the same schools and are educated in the same classrooms as their same-aged neighbors and friends. The focus of the school which practices full inclusion is the development of each individual's connection with others.

Teaching practices in a full inclusion school utilize cooperative learning, peer tutoring, community-referenced instruction, multi-modality instruction, metacognitive instruction, diverse and dynamic learning environments, individual attention to each learner's needs and supported learning. Resource allocation in a full inclusion school promotes team teaching among classroom and categorical personnel, integrated therapy, teacher consultation, clinical supervision, peer coaching, collegiality, parent-professional partnerships, community-school partnerships, student/teacher assistance teams and resource integration.

The New Mexico State Department of Education supports individual schools in its choice of the vision of full inclusion. The New Mexico State Department of Education pledges its resources and assistance toward the development of New Mexico schools which share the vision of full inclusion.

Posted: Sun, Jan 5, 1992 10:27 PM EST Msg: IGJC-5062-2155
From: SMITHDAVIS
To: lre
Subj: OPTIONS FOR PRE-TEENS PROGRAM OPENS IN NORFOLK AND OAKLAND

Arlington, VA -- Options for Pre-Teens (OPT), a program aimed at preventing early parenthood, school failure, substance abuse, and other barriers to positive youth development is underway in elementary schools in Norfolk, Virginia, and Oakland, California. The program is administered by the American Association of School Administrators

COLUSA HIGH SCHOOL

FULL-INCLUSION PLAN

1990/91

SCHOOL: Colusa High School

DISTRICT: Colusa Unified School District

DIRECTOR OF SPECIAL EDUCATION: Debra Owens

SUPERINTENDENT: Dr. Jim Mark

BOARD OF TRUSTEES

Dr. Donald R. Bransford
Mr. Dave Forry
Ms. Cindy Steidlmayer
Mr. Joe Struckmeyer
Ms. Virginia Yerxa

FULL-INCLUSION TASK FORCE

Stacie Fullbright, Student
Christi Hall, Student
Scott Hulbert, Student
LaTroy Justeson, Resource Specialist Teacher
Toni Kiely, Instructional Assistant
Bob Kirkman, Instructor
Dr. James G. Lutz, Principal
Bev Myers, Instructional Assistant
Debra Owens, Director of Special Education
Joe Struckmeyer, Board Member
Judy Tomlinson, Instructor
Becky Van Kleeck, Integration Specialist
Linda Wallace, School Psychologist
Jeanette Wrysinski, Parent(CAC)

DAY 1 HO

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COLUSA HIGH SCHOOL

MISSION STATEMENT

Colusa High School is committed to the idea that all students can learn and should have the opportunity to achieve academic and co-curricular success. Our high school holds high academic expectations for all students. We believe that high expectations for behavior and attendance lead to higher achievement. We value cultural diversity and welcome community involvement in all school programs.

DAY 1 HO

INTEGRATION

TEAM ACTION PLAN

Goal Full Inclusion of all Special Needs students at their school of residence

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
*1. Return students to school of residence	S.E.L.P.A.	Director of Special Education and site administrators	Increase accessibility of special needs students to community, peers, and activites	9/92
2. Special Needs population will be in a natural proportion to C.H.S. student population	S.E.L.P.A.	Director of Special Educ.	All students with disabilities will attend school of residence	9/92
4. All students will follow district calendar and hours to permit participation in entire school culture	S.E.L.P.A.	Director of Special Educ.	Will enable students to participate in co-curricular activities	9/91
5. Utilize district or county transit service	S.E.L.P.A.	Director of Special Educ.	More normalized, age-appropriate transportation	9/91

*=number refers to Quality Indicator Review number

INTEGRATION

TEAM ACTION PLAN

Goal Awareness that full inclusion is included in Mission Statement

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
3. Explanation of how full inclusion philosophy is included in the Mission Statement	C.H.S. Site Administration	Colusa High School Principal	A Mission Statement that demonstrates the full inclusion philosophy	9/91

DAY 1 HO

TEAM ACTION PLAN

Goal To "normalize" Special Education staff and identify support services on Individual Education Program (IEP)

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
16. Identify student helpers on IEP, using terms "if possible"	S.E.L.P.A.	IEP Team	Student Assistants are assigned as available and needed	91/92 IEPs
20. & 21. It would be desirable to "normalize" the Special Education staff	Site Admin. and S.E.L.P.A.	Director of Spec. Educ. and Site Principal	Special Educaton staff assume similar responsibilities and duties as assigned to regular staff. Special Education teacher contract will always serve as the binding agreement, if necessary.	6/92

HOME/SCHOOL PARTNERSHIP

TEAM ACTION PLAN

Goal To develop a written philosophy for the Full-Inclusion Program

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
10. Open door policy	Colusa High School Administration	On Site Principal	Parents have opportunity to visit classrooms and to interact with instructors and school staff	9/91
13. Write Philosophy on Full-Inclusion	S.E.L.P.A.	Director of Spec. Educ.	A written philosophy available to the public	9/91

DAY 1 HO

TEAM ACTION PLAN

Goal Establish a Student Planning Team

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
1. Develop a Student Planning Team for each participating student with severe disabilities	Outside schools with programs in place	Integration Specialist	A Student Planning Team will assist the the general and Special Education staffs to plan and implement comprehensive instruction for Special Needs students in typical school and community environments.	6/92

TEAM ACTION PLAN

Goal Instruction based on functional assessment conducted in natural environments

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
3. Research possible functional assessments available for natural environments	State Consultant (Tom Neary, PEERS) Individualized Criteria Skills Model(I.C.S.M.)	Integration Specialist	Improve ability to assess students in natural environment	12/91

DAY 1 HO

TEAM ACTION PLAN

Goal Individual Task Analyses and Discrepancy Analyses done as the basis of Individual Instructional Programs

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
4. Each year Task Analyses will be written for the three classes that have been determined by the Student Planning Team to have the greatest need.	On site instructors	Team of instructors from the chosen classes and Integration Specialist	Written form of student progress used as data system	6/92

TEAM ACTION PLAN

Goal Instructional cues to be designed more closely to fit natural cues in Criterion Environment

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
6. To develop reference sheets listing instructional cues which range from contrived to natural to be utilized by staff as needed	On site instructors	Integration Specialist	A more systematic progression towards natural environmental cues	12/91

DAY 1 HO

TEAM ACTION PLAN

Goal Provide handicapped accessibility to facilities on school site

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
1. Provide handicapped parking	On site maintenance	Maintenance/ Operations Director	Provide full access to school environment	9/91
5. Provide handicapped restrooms	Savage Plumbing Fusaro Construction Company	Maintenance/ Operations Director	Provide access to school facilities	9/91

PROGRAM PLANNING

TEAM ACTION PLAN

Goal To develop a fully articulated Integration Plan

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
C1 and 2. A committee will be formed of parents, staff, administration and students to develop an Integration Plan.	"Schools For All Kids" materials	Colusa High School Principal	A written Integration Plan defining the Full-Inclusion Program, to act as a guideline for those involved. The Plan will include: Philosophy Goals Objectives Strategies Placement procedures Individual Planning Teams	1/92

PROGRAM PLANNING

TEAM ACTION PLAN

Goal To develop a fully articulated Integration Plan

Objectives/Activities	Resources	Person Responsible	Expected Outcomes	Timeline
C1 and 2. A committee will be formed of parents, staff, administration and students to develop an Integration Plan.	"Schools For All Kids" materials	Colusa High School Principal	A written Integration Plan defining the Full-Inclusion Program, to act as a guideline for those involved. The Plan will include: Philosophy Goals Objectives Strategies Placement procedures Individual Planning Teams	1/92

DAY 1
H.O.

PEERS

Providing Education for Everyone in Regular Schools

IMPLEMENTATION SITE CRITERIA FOR FULL INCLUSION PROGRAMS

1991

Ann T. Halvorsen, Ed.D
Tom Neary, M.A.
Lynn Smithey, M.A.

In collaboration with California Research Institute

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Sponsored by the California Department of Education, Special Education Division

IMPLEMENTATION SITE CRITERIA FOR FULL INCLUSION PROGRAMS

Many of these *Implementation Site Criteria* have been taken from or adapted from: Meyer, Eichinger & Park Lee (1987). "Program Quality Indicators." JASH, Winter, 255-257.

This tool is intended to assist in the identfication of schools providing quality inclusive educational programs for students with severe disabilities. It may also serve as a needs assessment tool for schools establishing inclusive education.

Please check as appropriate and comment as necessary.

I. Environmental Considerations	yes	no	sometimes	comments
A. Facilities				
1. Students are included in age-appropriate(+/- 1 yr.) general education homerooms.	☐	☐	☐	
2. School is the one students would attend if non-disabled.	☐	☐	☐	
B. Student issues				
1. K-12 full inclusion programs have been established.	☐	☐	☐	
2. Students have the same school calendar and hours as their general education peers.	☐	☐	☐	
3. Identified special education student numbers are within natural proportion guidelines.	☐	☐	☐	
II. School Climate				
A. Ownership				
1. Principal is *ultimately* responsible for implementation of the program, which includes supervision and evaluation of program staff.	☐	☐	☐	
2. There is a defined plan or process for supporting staff in implementation (ie. time for team planning meetings).	☐	☐	☐	
3. Ongoing site preparation or "ability awareness" occurs and/or is incorporated into generral education curriculua.	☐	☐	☐	

	yes	no	sometimes	comments
4. The school mission statement reflects a philosophy that every child is educable and considers the school to be accountable for serving all kids.	☐	☐	☐	
5. The school philosophy emphasizes responsiveness to families and support to meet family needs.	☐	☐	☐	
6. The school philosophy supports the need for staff inservice training on a regular basis.	☐	☐	☐	
III. Special education teacher integration				
A. The special education teachers have responsibilities within the school to:				
1. attend faculty meetings with general education staff.	☐	☐	☐	
2. participate in regular supervisory duties (eg. lunch/bus/yard duty).	☐	☐	☐	
3. participate in extracurricular responsibilities (eg. chaperone dances, work with student clubs).	☐	☐	☐	
4. follow school protocol: keep principal or appropriate administrator informed on an ongoing basis.	☐	☐	☐	
B. Special education teacher interaction includes:				
1. positive public relations skills with general education staff.	☐	☐	☐	
2. taking lunch breaks and/or prep periods in the same areas as general education staff at least once a week.	☐	☐	☐	
3. arranging meetings with general education staff as necessary for maintaining communication with involved faculty.	☐	☐	☐	

PEERS 199

	yes	no	sometimes	comments
C. Special education teacher modeling and instruction includes:				
1. consistently modeling positive attitudes towards and appropriate interactions with all students.	☐	☐	☐	
2. using age-appropriate terminology, tone or voice, praise/reinforcement with all students.	☐	☐	☐	
3. employing age-appropriate materials in instruction.	☐	☐	☐	
4. designing students' programs to include instruction of functional activities in many school and non-school settings.	☐	☐	☐	
5. implementing behavior management strategies that are positive and utilize natural cues/corrections to the maximum extent possible.	☐	☐	☐	
6. writing IEP objectives and individual programs to reflect interaction with nondisabled peers.	☐	☐	☐	
7. developing non-classroom environments in the school to be used for interactive functional activities for appropriate portions of the school day.	☐	☐	☐	

IV. General education classroom

	yes	no	sometimes	comments
A. General education classroom teacher:				
1. provides safe, orderly and positive learning environment for all students.	☐	☐	☐	
2. establishes high expectations for all students.	☐	☐	☐	
3. monitors student progress systematically.	☐	☐	☐	
4. participates as an IEP team member.	☐	☐	☐	

	yes	no	sometimes	comments
5. utilizes cooperative learning strategies.	☐	☐	☐	
6. utilizes multi-dimensional performance groups.	☐	☐	☐	
7. individualizes activities for students.				
8. participates as a member of the school integration team.	☐	☐	☐	
9. collaborates with others in coordinating peer network/interaction systems.	☐	☐	☐	
10. encourages and supports friendship development for all students.	☐	☐	☐	
11. collaborates with parents/care providers.	☐	☐	☐	
12. collaborates with special education teacher and paraprofessional(s).	☐	☐	☐	
13. team teaches with special education teacher.	☐	☐	☐	
14. collaborates with special educator(s) to adapt learning objectives for students within the context of the core curriculum.	☐	☐	☐	
15. collaborates with special educator(s) to make material and environmental adaptations.	☐	☐	☐	
16. collaborates with special educator(s) to provide physical assistance as needed.	☐	☐	☐	
17. allows for alternative/substitute curriculum as appropriate.	☐	☐	☐	

V. Student integration

A. General school activities include:

1. Students have access to all school environments for programming and interactions.	☐	☐	☐	

Implementation Site Criteria for Full Inclusion Programs

		yes	no	sometimes	comments
2. Students participate in and are integrated for regular activities such as: (check activities)					
music	field trips	☐	☐	☐	
art	home ec.	☐	☐	☐	
library	work exper.	☐	☐	☐	
gym	recess/break	☐	☐	☐	
lunch	computer use	☐	☐	☐	
assemblies	regular class	☐	☐	☐	
clubs	other:	☐	☐	☐	
3. Students participate in grade level activities (eg. 8th grade dance, 6th grade camping trip, senior's graduation).		☐	☐	☐	
B. Interaction with peers during the school day.					
1. Students instructional programs incorporate interaction with general education students in the following areas (check all that apply):					
a. communication skills (within activities)		☐	☐	☐	
b. social skills (within activities)		☐	☐	☐	
c. community domain functional activities		☐	☐	☐	
d. vocational domain functional activities		☐	☐	☐	
e. recreation/leisure domain		☐	☐	☐	
f. domestic domain functional activities		☐	☐	☐	
g. other (specify):		☐	☐	☐	
2. Students are involved in regular structured interaction programs with age-appropriate nondisabled peers such as (check all that apply):					
a. peer tutoring in school and community		☐	☐	☐	
b. "PALS" (Partners at Lunch)		☐	☐	☐	
c. regular education class activities (list)		☐	☐	☐	
d. co-workers in job training		☐	☐	☐	

Implementation Site Criteria for Full Inclusion Programs

	yes	no	sometimes	comments
3. Strategies to support inclusion and foster friendships are employed (check all that apply):				
a. Maps	☐	☐	☐	
b. Circle of friends	☐	☐	☐	
c. Other (specify):	☐	☐	☐	
4. These interactive programs are:				
a. well organized	☐	☐	☐	
b. positive in orientation (emphasizing student strengths, focusing on functional activities)	☐	☐	☐	
c. well attended	☐	☐	☐	
d. supported by principal, faculty and parents	☐	☐	☐	
e. viewed as a positive experience by students	☐	☐	☐	
C. Ongoing provision of information				
1. General education students have received information about disabilities via (check all that apply):	☐	☐	☐	
a. slide show presentation and discussion about the students	☐	☐	☐	
b. learning stations or simulations about learning disabilities	☐	☐	☐	
c. commercial media (films etc.)	☐	☐	☐	
d. guest speakers who have disabilities	☐	☐	☐	
e. disabilities unit within general education curricula, role playing, modeling and feedback from special education teacher regarding how to interact with or instruct specific students	☐	☐	☐	
f. specific training in systematic instructional techniques including data collection (peer tutors)	☐	☐	☐	
g. informal discussion/Q&A sessions with special education staff	☐	☐	☐	
h. other (specify):	☐	☐	☐	

	yes	no	sometimes	comments
D. Extracurricular activities				
1. Students with disabilities are involved in extracurricular activities associated with the school:				
a. clubs	☐	☐	☐	
b. dances	☐	☐	☐	
c. after school recreation/day care programs	☐	☐	☐	
d. scouts	☐	☐	☐	
e. other:	☐	☐	☐	
2. Students with disabilities currently have access to the following extracurricular activities: (list)	☐	☐	☐	
VI. Curricular and instructional model				
A. The implementation site teacher:				
1. has organized each student's program according to the following domains:				
a. community	☐	☐	☐	
b. domestic	☐	☐	☐	
c. recreation/leisure	☐	☐	☐	
d. vocational	☐	☐	☐	
e. academic integration	☐	☐	☐	
2. (regarding the domains listed above), emphasizes interaction with nondisabled peers within these activities.	☐	☐	☐	
3. has developed IEP objectives based upon the parent interview process.	☐	☐	☐	
4. plans activities using materials, instructional procedures and environments that are age-appropriate and individualized.	☐	☐	☐	

	yes	no	sometimes	comments
5. instructs all students in natural environments maintaining natural proportions.	☐	☐	☐	
6. completes functional assessments for all targeted activities.	☐	☐	☐	
7. involves related service staff in functional assessments in natural settings.	☐	☐	☐	
8. develops written instructional plans for each IEP objective.	☐	☐	☐	
9. works with related service personnel to provide integrated therapy services with nondisabled peers.	☐	☐	☐	
10. collects specific data to document student performance and to identify a need for program modification.	☐	☐	☐	
11. periodically probes for maintenance and generalization in the natural environment.	☐	☐	☐	
12. develops adaptations which are useful across environments, to facilitate independence.	☐	☐	☐	
13. utilizes positive programming and other nonaversive strategies in behavior change programs.	☐	☐	☐	
14. assists families in accessing community resources.	☐	☐	☐	
15. initiates systematic planning to support transitions from one program to another.	☐	☐	☐	

The *Implementation Site Criteria* are utilized to identify potential sites to serve as internal demonstration sites. It is not meant to be a tool for evaluation.Completion of these criteria should identify strengths and result in the identification of growth objectives.

CALIFORNIA RESEARCH INSTITUTE
TECHNICAL ASSISTANCE APPLICATION
FOR
SB 1274 PLANNING GRANT DISTRICTS

Completed by: ______________________ Date: ____________

Address: ______________________ Phone: ( ) ____________

______________________ FAX: ( ) ____________

SB 1274 Planning Grant District: ______________________

____

School: ______________________

Principal: ______________________

Address: ______________________ Phone: ( ) ____________

______________________ FAX: ( ) ____________

Contact Person: ______________________

Address: ______________________ Phone: ( ) ____________

______________________ FAX: ( ) ____________

DEMOGRAPHIC INFORMATION FOR LEA/SCHOOL SITE

☐ Rural

☐ Urban

☐ Suburban

Ethnicity: ______________________

____

____

Grade levels included at school site: ______________________

Total number of students enrolled at school: ______________________

Number of students with IEPs in school: ______________________

Types of special education services & disabilities of students: ______________________

____

PLEASE SEND TO:

Dotty Kelly
California Research Institute
14 Tapia Drive
San Francisco, CA 94132
Phone: (415) 338-2959
FAX: (415) 338-6121

CALIFORNIA RESEARCH INSTITUTE

TECHNICAL ASSISTANCE CHECKLIST FOR SPECIAL EDUCATION IN THE RESTRUCTURED SCHOOL

Please check the space on the left column if you are interested in technical assistance in this area of restructuring. Also indicate in the right column the school's current status in implementing each specific component and make comments as needed.

		YES	NO	SOME-TIMES	DON'T KNOW	COMMENTS
	A. Site-Based, Shared Decision Variables					
____	1) Strong site-based management of personnel & resources	____	____	____	____	
____	2) Teacher participation in decision-making & resource allocation through a "site resource management team"	____	____	____	____	
	B. Resource Infusion Variables					
____	1) All categorical programs returned to and coordinated at school site for good of all students	____	____	____	____	
____	2) Maximum use of regular classroom and other regular groupings for instruction of all students	____	____	____	____	
____	3) Strong use of effective schools instructional models, including heterogeneous groupings (non-tracked); cooperative learning groups; multiple learning environments; and peer instruction	____	____	____	____	
____	4) Pre-referral strategies prior to categorical identification placement; use of child study teams	____	____	____	____	
____	5) Increasing reliance on curriculum-based and functional outcome-based assessment systems	____	____	____	____	
____	6) Adherence to a strong core curriculum geared to high expectations for all students	____	____	____	____	

		YES	NO	SOME-TIMES	DON'T KNOW	COMMENTS
	B. (continued)					
____	7) Use of high-expectancy textbooks and instructional materials	____	____	____	____	
____	8) Full participation of all categorical students' homeroom assignments (where applicable)*	____	____	____	____	
	C. Community Involvement Variables					
____	1) Inclusion of parents (regular & categorical) on site-based resource management (decision-making) team	____	____	____	____	
____	2) Inclusion of operation of early childhood programs for all students at day-care and preschool levels that are fully integrated & mainstreamed (where applicable)**	____	____	____	____	
____	3) Operation of before & after school child care & recreation programs	____	____	____	____	
____	4) Increased utilization of school site facilities for community-school meetings & parent participation events	____	____	____	____	
____	5) Vocational, community utilization, & domestic living skills sites for categorical student instruction off campus (where applicable)*	____	____	____	____	
	D. Coordination of All Childrens' Services					
____	1) Health services through linkages with local health planning agency, i.e., county health dept.	____	____	____	____	
____	2) Health screening and referral services through increased utilization of school-based Medicaid and other programs where applicable	____	____	____	____	

---

* Middle school and/or high school only

** Regular preschool program for all students

D. (continued)

		Yes	No	Sometimes	Don't Know	Comments
____	3) Health and social services through on-site case management	___	___	___	___	
____	4) Increased participation of child protective services at school site	___	___	___	___	
____	5) Family Transition Plans at age 14 choice point for all students*	___	___	___	___	
____	6) Implementation of transition planning and case management for all students*	___	___	___	___	
____	7) Direct linkage with business and industry for job training and internship programs for categorical students & students at risk*	___	___	___	___	
____	8) Joint participation with community colleges for continuing education programs (where applicable)*	___	___	___	___	

Please specify your 5 top priorities.

Priority 1 ____________________

2 ____________________

3 ____________________

4 ____________________

5 ____________________

Please complete and return this form by March 13th at the latest to:

Dotty Kelly
California Research Institute
14 Tapia Drive
San Francisco, CA 94132
Phone: (415) 338-2959
FAX: (415) 338-6121

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* Middle school and/or high school only

PEERS

Date ______________ School Site ______________ Address/Phone ______________

Team Members:

AREA	OBJECTIVES	ACTIVITIES/STRATEGIES	RESOURCES NEEDED	PERSON RESPONSIBLE	TIMELINE

Inclusive Education
Peers: Day 1

ABILITY AWARENESS EDUCATION

COOPERATIVE LEARNING ACTIVITY

1. GOAL: Utilize jigsaw strategy to acquire and share information about ability awareness techniques that can be used to promote acceptance of diversity and increased interactions among all students.

2. TASK SEQUENCE:

    5 minutes - Activity description
    5 minutes - Divide home group among four "expert" groups (#1-4)
    5 minutes - Read expert group's material
    10 minutes - Discuss material with expert group. Cover major points
    5 minutes - Return to home group
    Each expert group reports
    10 minutes - Share content for 5 minutes with home group (#1 first, go in sequence)
    10 minutes - Large Group: Discuss and evaluate uses of jigsaw strategy for ability awareness with students and adults

Group 1 Day 1
Coop Learning Task

ABILITY AWARENESS EDUCATION
Overview: Part 1

The purpose of ability awareness programs is to provide students, staff, and parents with **accurate information** about people who experience disabilities. In particular these programs should emphasize the **similarities** between people with and without disabilities, and focus on their **abilities**. Well-designed ability awareness programs provide students with information and strategies to enhance the **interactions** among students with and without disabilities. If there are no opportunities for regular, reciprocal interactions, then the information and strategies acquired are unlikely to be sustained. Most importantly, this interaction is clearly a necessity for real relationships to develop.

There are several approaches to providing an ability awareness program, (which are discussed in additional sections). These include:

1. Infused material (units , themes, lesson plans) within general education curricula (e.g. Science, Literature, Social Studies).
2. "Add-on" /episodic ability awareness, e.g.: fairs. one time learning stations, guest speaker series. All of these should include specific follow-up activities for the participating students to ensure mastery of the concepts presented.

Halvorsen, A. (1992)

Resources: Ability Awareness
Finding Out ! Overview: Part 2

Day 1
Group 1

About Disabilities

There are some who say that the disabled child is simply like any other child. There's almost no difference, they argue. They'd rather not notice. Others point only to difference, suggesting that disabled children might be better off with their own kind. It's not the child's fault, they add, it's just too bad. They notice too much.

Among the various special needs of disabled children, none may be more pervasive, more special, than the need to be understood. Certainly none is more beyond the disabled child's individual ability to control. For, in the face of those who may not see, hear, walk, speak or understand as well as others, we pile obstacles of mystery, misconception and misunderstanding. The irony is indeed cruel.

Unfortunately, most children do not have an opportunity to learn even basic information about disabilities. Instead they learn by omission. And what they learn are the great myths. When we interviewed hundreds of school children about disability issues, we found that non-disabled children tend to think that their disabled peers are sad most of the time. When asked what occupations disabled people will have, children told us about "blind newspaper stand operators," deaf printers." and other stereotypes. (It was a refreshing surprise to find that one child drew a colorful picture of a person in a wheelchair located on a scaffolding near the top of a high-rise building, washing windows). Children also told us that they think disabled children are actually "sick". These are some of the myths that we want to help overcome.

We present some brief information about disabilities to help deflate the major myths about disabilities, not to create or confirm them. Labelling smacks of name-calling. It almost always leads to stereotyping and/or oversimplification; it is inhibiting and damaging not only to the "tagged" person, but also to the "tagger" who, presumably non-disabled, is oblivious to the disabled person's context and reality. Labeling encourages generalizations and fosters the lumping or categorizing of people within a context of deficiency, rather than capability. People with the same disability are almost always very different from each other, in the same way that any person is different from another person. But labels tell us the opposite.

So we offer our comments on the major types of disabilities with misgivings. We do not want to make it seem that people who have disabilities are a particular kind of people, set apart from others. On the other hand we think that it is important for all people to know some basic things about disabilities.

Children, school mates, peers, want and need to know. Yet they themselves have been damaged by the "mystery and mockery" surrounding disabilities. To compensate, they need their questions answered honestly, directly, seriously. But, most of all, they need the chance to observe and emulate adults who are, themselves, concerned and compassionate about and with other people.

Barnes, C.: Berrigan, C.; Biklen, D. What's the Difference. Syracuse, NY: Human Policy Press, 1978. (107-108) (Out of print)

Day 1 - Group 2
Coop Learning

DO & DON'TS OF ABILITY AWARENESS

DO

Talk about students in terms of the *people* they are *first* (e.g. "students who experience disabilities." "Mary, who has cerebral palsy..." "John, who uses a wheelchair, is learning to...etc")

Talk about students' preferences, curriculum, interests, emphasizing their *similarities* to nondisabled age peers, and their competence (e.g. "Jim really likes hamburgers. In this slide he's purchasing one at McDonalds using his communication book.")

Talk to and about your students in the ways you want to hear others talk to and about them.

A needs assessment with the principal, faculty, and students to make sure that the ability awareness addresses their questions and concerns, and will fit logistically into their curricula and time constraints (e.g. provide interested social studies teacher with civil rights lesson: give elementary teacher sample activities from *What's the Difference*).

DON'T

Talk about students' mental ages or describe them by using a disability label ("he's a CP kid, she's a Down's") or use expressions such as "wheelchair kid" since these labels set people apart. Labels tend to emphasize differences, and they *don't* provide any real information about the *person* and how to interact with them, what they enjoy, etc.

DON'T

Use Special Ed. jargon ("TMR", "DCH", "SDC", "IEP" etc.) and don't use disabled as a noun ("the disabled" etc.)

DON'T

Talk about historical information or causation of the disability *except* in *general* terms and where it is appropriate to the general education class in which you are doing ability awareness (e.g. a unit on certain genetic conditions *might* be appropriate within a family life class).

Group 2

DO

When you are doing learning stations about specific disabilities always focus the activity toward the positive, how the person participates, what s/he can do, adaptations enabling participation etc.

Invite consumers (students),parents/ family members to become involved in presentations to interested classes.

Provide question boxes (elementary level) after a presentation or activity so that students can write out or dictate to their teacher other concerns or questions that you can respond to later, or design future awareness activities to address.

Discuss with the principal about making a presentation at the first PTA meeting and/or open house about students, their goals and the reasons for inclusion.
Encourage your students' parents to participate in school PTA or similar activities.

Include yourself: Take prep and break periods with general ed staff, attend faculty meetings, take on school responsibilities (yard, bus duty, chaperoning, etc.).

Develop and implement ability awareness programming in collaboration with other general education and special education staff in the school

Move as a school team toward infusing ability awareness into general education curricula.

DON'T

Provide media (e.g. "Regular Lives" or other films and books) without providing time for discussion, questions and answers.

DON'T

Expect general education teachers to be immediately enthusiastic about incorporating ability awareness. content into their curricula. (Instead do talk to Department Heads (secondary) and/or present at faculty meetings (elementary/middle) to generate interest).

DON'T

Ignore school support staff in your ability awareness effort: do remember secretaries, custodial and cafeteria staff etc.!

Day 1 Ability Awareness
Group 3 - Coop Learning

Curricular Infusion for Ability Awareness
A General/Special Educator Partnership

Curricular infusion involves the inclusion of information and experiences concerning students with severe disabilities at natural points throughout the general education curriculum. (In Hamre-Nietupski, Ayres, Nietupski, Savage, Mitchell & Bramman, 1988). This is in contrast to an additive or add-on approach. For example, does this integration story sound familiar? It begins with the placement of a class of students with severe disabilities into a regular middle school. In order to facilitate a smooth transition process, our energetic special educator receives permission from the principal to conduct beginning of the year "sensitization/information sessions". She then makes presentations to each sixth, seventh, and eighth grade class during her free period. Using slides of the students with severe disabilities engaging in age appropriate activities, the special educator presents accurate information about mental retardation, cerebral palsy, epilepsy, and about each of her individual students. She encourages the audience to observe that the students with severe disabilities are more similar to themselves than different. She also informs them that those who would like to get to know their peers with severe disabilities better, should come to her room anytime that week.

Variations of this scenario are occurring in schools throughout the country. Could there possibly be anything wrong with this approach? After years of organizing, participating in and observing similar situations in many different schools, we have come to the conclusion that there can be difficulties with this approach. The major difficulty arises, in our view, because such activities are **additive** in nature; in other words, they are not an integral component of the regular school experience. Sensitization sessions held at the beginning of the school year are common examples of additive activities. Typically, these activities may increase student interest for a short while, but **in and of themselves are not sufficient** to promote positive and long lasting changes in attitudes and interactions (Voeltz, 1984). Enthusiasm generated by these activities may decrease with time because **they are not firmly embedded** into the fabric of the school experience.

A second problem is that such an approach places the impetus for integration **almost solely upon the special educator.** If that individual does not expend considerable energy, successful integration frequently does not occur. **A third problem is that by establishing the special educator** as the driving force behind integration, general educators **need not assume ownership** over the integration process. If the particular special educator leaves his or her position or does not maintain the previous feel of enthusiasm and effort, integration activities easily can come to a halt. While we are not advocating total abandonment of additive activities, we are recommending strongly that they not be used in isolation. Rather, additive activities should be arranged in conjunction with **activities made a part of the general education curriculum**. Additive activities can be used successfully, but they should not be viewed as sufficient if the goal is maximal integration of students with severe disabilities.

For integration activities to have a more powerful and long lasting impact on the attitudes and interactions of nondisabled students, as well as general education staff, those activities must become an ongoing, integral component of the general education experience. This process, termed "curricular infusion", provides students without disabilities with accurate and positive portrayals of persons with disabilities and opportunities for structured, positive interactions on an ongoing basis. The purpose of curricular infusion is to promote understanding and acceptance of students with disabilities by their peers without disabilities. Emphasis is placed on expanding regular education curriculum to include reference to disabilities **at appropriate points, not to alter the focus of that curriculum to disability - related issues**. Preference in curricular infusion activities is placed on involving students in process-oriented activities that promote understanding, respect and acceptance, rather than more static presentations of information. Emphasis is placed on application to real life situations, such as strategies for including a particular student in integrated activities, rather than dealing with abstractions only (Hemphill, 1981, Voeltz, 1984).

Curricular infusion has several advantages over additive activities. **First, it can promote a partnership** between general and special educators and joint ownership of integration activities. Such collaboration, although recently advocated (Will, 1986), frequently does not occur. Second, students without disabilities may come to view their peers with disabilities as a **central part of the school** rather than only being in their consciousness during special events such as "handicapped awareness week". Finally, staff changes need not result in cessation of integration activities, since those activities will have become an ongoing component of the curriculum.

This material is excerpted intact from a 1988 paper entitled - Enhancing integration of students with severe disabilities through curricular infusion: A general/special educator partnership, by Sue Hamre-Nietupski, PH. D., University of Northern Iowa, Dept of Spec. Ed. Bob Ayres, M.A.E., Syracuse University, Division of Rehabilitation & Spec. Ed. John Nietupski, Ph.D., University of Northern Iowa, Dept., of Spec. Ed. Mike Savage, B.A. Bruce Mitchell, B.A. & Hank Bramman, B.A., West Delaware Middle School, Manchester, IA.

Group 4
Day 1 - Coop Learn

Add-on or Additive Approaches to Ability Awareness Education

While most educators would agree that it is our goal to see positive information about persons with disabilities become infused within the appropriate general education curricular areas, this may not be feasible as the first step in initial inclusion efforts. Therefore, special educators may need to take primary responsibility for **initial** ability awareness planning in order to demonstrate what's possible to general educators at their school, with the **stated objective** of obtaining a team commitment to future infusion of ability awareness material in general education curricula.

As this first stage, an additive program can be delivered through **resources** such as **parent or community volunteers** recruited through the school, PTA, or Community Advisory Council; **support staff** interested in being trained to provide ability awareness (nurse, psychologist, speech therapist) or through involvement of **nondisabled peers** (from clubs, leadership class, service groups, or newly formed peer networks - circles of friends) who can also be trained to provide information to **their** peers.

Some general and specific "add-on" approaches that might be used are outlined below:

1. General Awareness Strategies

    - Learning Stations about people with disabilities for all grade levels covering areas such as intellectual disability, communication alternatives, locomotion, and visual impairment, etc. Emphasis on how person adapts and on similarities. Students rotate through adult or peer- run stations that are about 10 minutes each so that four stations can generally be done in one period. Follow-up materials are provided to general education teachers. Stations can follow a trainer-of-trainers

Commercial media, e.g Regular Lives, With a Little Help from my Friends, Feeling Free, A Different Approach. Imperative that directed discussion follows.

Lesson Plans delivered by Special Education staff that addresses general education curricular content (Hawaii manuals, What's the Difference, etc.)

2. Specific Awareness Strategies

Slide Show depicting students in general education lessons, classes and activities with their equipment and adaptations, with typical peers, participating in age-appropriate tasks or leisure. Slides and oral script should highlight areas of students' competence and learning, and similarities to their nondisabled peers as well as familiarizing the viewer with any unusual equipment (walkers, standing tables, etc.) Teachers and/or parents and support staff can do slide show presentations in classes where students are included or in classes from where peer networks will be established. May also do slide shows for PTA, faculty and school staff.

Topical presentations by guest speakers (including students) who experience disabilities, by parents of students with disabilities, or by special educators regarding their experiences can be tailored and scheduled to occur within specific content areas of curricula (e.g. unit on prejudice in Social Studies, unit on genetics in Science).

PEERS

PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

PROJECT DIRECTOR
Patrick Campbell, Asst. Superintendent/Dir
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3567
(916) 657-5086 FAX

REGIONAL OFFICES
Tom Neary
650 Howe Avenue
Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D
Ed. Psychology Dept
CSU, Hayward
Hayward, CA 94542
(510) 881-3087 or
(415) 338-7849

Suzanne M. Gilbert
El Toro HS, Room 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8558
(714) 837-5066 FAX

Steve Johnson, Administrator
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3256
(916) 657-5086 FAX

SCHOOL SITE TEAMS
DAY 2

OBJECTIVES

Participants will:
1. gain an awareness of the characteristics and the impact of negative and positive teacher modeling in inclusive settings.
2. identify role changes needed by general and special education team members to provide quality inclusive programs.
3. gain an understanding of the collaborative and transdisciplinary team planning process for inclusion.
4. gain an understanding of the family perspective of full inclusion.
5. identify strategies for the development and enhancement of social skills and friendships among students.
6. further develop action plans.

AGENDA

		page number
8:30	Objectives/agenda	
8:40	Team reports from three teams	14
8:55	The importance of adult modeling	15
9:20	Modeling vignettes	18
9:45	Introduction to a collaborative model	19
9:55	Video: "Transdisciplinary Team Functioning"	19
10:15	BREAK	
10:30	Team approach to problem solving: Role play	20
11:15	Site Team planning	21
12:00	LUNCH	
1:00	A family perspective on inclusion	22
1:45	Questions	
2:15	BREAK	
2:30	Overview to friendships	23
3:30	Strategies to facilitate friendships	27
4:15	Site Team planning	41

MATERIALS

Topic: Team Reports (15 min.)

8:40
TRAINER'S NOTES

Yesterday, you had the chance to meet as a team to assess your site's present practices in terms of inclusion and to prioritize for the week those areas on which you want to focus.

Let's have three teams report this morning on your initial action planning. Take about 3 minutes to report. If there are some brief, supportive comments others want to provide the reporting teams, please do.

DIRECTIONS

Ask for volunteers. Keep the reports moving and watch time. Ensure that comments made from the other participants are supportive. Trainers may need to remind individuals about that.

MATERIALS

Topic: Modeling (25 minutes)

8:55 AM
TRAINER'S NOTES

One of the most important strategies for successful inclusion, and in fact what forms the very basis for inclusion, is how adults "model". It's obvious how powerful our own behavior is when we begin to hear our own words and see our own actions from our own children and students. All the well planned and artfully packaged ability awareness lessons and lectures are fluff if we do not live what we speak.

It's important to realize that many us us were not raised in a climate of unconditional regard for people with disabilities. Students with disabilities were either in separate classrooms or in separate schools if they were in school at all. Expecting that simply because we've become adults, we will be aware of disability issues and be respectful in our day-to-day interactions is not realistic. Modeling for our students and each other will demand a conscious effort and a constant examination of our attitudes, expectations and belief systems. How we interact with and around our students with disabilities will have a great impact on how others, students and staff, will act.

We've identified a number of scenarios that each of us has experienced in education. They portray a situation in which a teacher or administrator interacts with students, one or more of whom experience disabilities. We'll move through all five and ask you to jot down some notes that identify "what is wrong, here?" We'll of course, be overacting a bit, but look for the obvious and not so obvious things that are being modeled and what might be the implications.

DIRECTIONS

Prior to this session, trainers would have selected specific roles to play in the following modeling situations.

1. Two students are going down the hall in the school. One student is being pushed in his wheelchair by his friend. The school principal, coming down the hall in the other direction, stops and says very loudly to the student using the chair, "Hi! how are you? Are your having a good day? So nice to see you! Is he doing O.K.?" (to his peer). The principal does not acknowledge the peer except to ask about the student with disabilities.

Scenarios for modeling (for Trainers only)

Topic: Modeling *(Continued)*

2. Students are sitting at a table in a cooperative learning group. One of the four students has cognitive disabilities and some problems sitting still. The general education teacher is giving directions to the whole group about the expectations of the activity. The special education support person is not in the room and the general education teacher is complaining about the fact that "she's never here on time." The students at the table launch into the activity without including the student with special needs who is playing with some of the materials. When the special education support person gets there, she begins by rewarding the student with fruit loops for "good sitting".

3. A new student is joining an elementary class mid-year from a special class for students with severe disabilities. The new student does not communicate verbally and has had some problems with her behavior. In introducing the new student, the teacher says, "Class, this is Rebecca. She is a handicapped child who will be in our class for a while so she can learn to be like everyone else. Now, she'll be doing her own work in here, but I want you to make her feel like she belongs. Rebecca doesn't speak, so if you have anything you need to say to her, I'd prefer that you tell Mr. Stevens here, who is her helper, and he'll tell her, since they use a special language. If Rebecca bothers you, or you see her doing anything she shouldn't, be sure to let Mr. Stevens know right away".

4. Students in an elementary class are doing an art project. The general education teacher takes the project being completed by a student with disabilities and hold it up to the class saying, "Look everyone! Look at what Susie did! Isn't it wonderful? Susie, this is just beautiful! What a good girl!" Susie is the only student she treats this way.

5. Sam is in the cafeteria for lunch. He needs almost total assistance to eat and is unable to communicate verbally. His special education support person approaches him with all his "special feeding gear", towel to drape as a bib, smock to protect his(staff's) clothing, spoon, pureed food, etc. He drapes the towel over and proceeds to feed Sam from the side, talking with other staff as he works. He does not talk to Sam except to say, "What's wrong with you? You liked this yesterday." and to others around Sam, "He is so stubborn sometimes." He pushes food into Sam's face, who is turning away and beginning to fuss. No choices are offered.

MATERIALS

Fruit Loops/snacks

Color drawing
or painting

Towels
Bib
Spoon/bowl
Apple sauce or yogurt
Smock

MATERIALS

Topic: Modeling *(Continued)*

DIRECTIONS

After role playing these scenarios, stop and have participants as a large group provide comments on what they saw, what was wrong with the picture and what the implications of that type of modeling are. Ask what might be a better way of modeling in that situation. Encourage discussion among the group and be sure they focus on practices that model both acceptance of differences and respect for individuals.

Topic: Modeling Vignettes (25 minutes)

9:20 AM
TRAINER'S NOTES

We'd like you to work now as a site team to discuss some potential situations. Each team will be given a scenario to discuss. We would like you to come to some agreement in terms of how it should be handled. Please consider both the effectiveness of what is done and the importance of modeling respect and acceptance.

DIRECTIONS

Assign one scenario to each team. Provide 10 minutes for each team to discuss the situation and decide on how it should be handled. Teams can add information in any scenario if they feel it's necessary, as long as they share that with the group.

Take the next 15 minutes to have each group share their decision, explaining why this decision was reached. Trainers should listen, clarify and ensure that strategies recommended actually do show respect and acceptance while effectively dealing with the situation. Encourage other teams to comment on how they might have handled the situation and why.

MATERIALS

Provide
"Teacher model situations"

1. Jennifer on the slide
2. Bill upset in the cafeteria
3. Joe "self-stimulating"
4. Susan has an accident

MATERIALS

Topic: Introduction to a Collaborative Model (10 minutes)

9:45 AM
TRAINER'S NOTES

One of the ways inclusion has impacted education has been to cause a close examination of the traditional roles played, particularly by special education staff. Historically, special educators have operated in separate settings, providing direct service for the whole day. As students become more and more involved in integrated settings, and more specifically as they are spending, in many cases, the entire day in general education classrooms, this delivery system is not possible or even warranted.

Practitioners of inclusion have come to the realization that we need to expand the base of decision makers in serving students with special needs and have instituted a more collaborative approach to decision making and service provision for students. This collaborative approach is a *transdisciplinary* model, Specific disciplines, such as teaching staff, speech and language therapists, physical and occupational therapists, vision and hearing specialists, mobility specialists, adapted P.E. staff, psychologists, parents and others not only share information from their specific area of expertise, but they assess together and share roles in intervention. In a transdisciplinary model, it is not uncommon to see the speech and language specialist working with a student on an occupational therapy objective and vice versa.

Overhead of "multi"," inter" and "trans" disciplinary models

The following video was developed by the California Research Institute in conjunction with the Paradise Valley School District in Arizona to demonstrate and discuss their transdisciplinary model.

"Paradise Valley: Transdisciplinary Integrated Related Services" 15 minutes

DIRECTIONS

Following the video, discuss what was presented, questions they might have and any comments about the team planning process. It's likely that teams will be interested in the logistics of team meetings, for example, when teams meet, how long the meetings last. Encourage the large group to generate ideas for solving these concerns.

10:15
BREAK

Topic: Team Approach to Problem Solving (45 min.)

10:30

TRAINER'S NOTES

There is some time now for you to work together as site teams. The task at this time is to focus specifically on the structure of the building level team you are forming. As you begin this planning, remember that there are different kinds of teams that make full inclusion work. There are instructional planning teams, building level teams, and district level teams. Teams in support of full inclusion are always individualized to meet the needs of specific situations and they may have a variety of names, but basically our experience has shown us that teams are important at the student planning level, at the site level and at the district level. For now, your planning time should be spent defining your building level team.

There are several questions you might try to answer as you plan. What is the purpose of the team? How will it be structured? How big will the team be? Who will be on it? What constituencies will be represented on the team? What logistics need to be addressed? How often will the team meet? When and where will it meet?

As you begin to answer these questions, you will be developing a structure that will serve you well in the future as you move forward in providing fully inclusive schooling. In order to be sure that the team is as effective as it can possibly be you might want to keep in mind several points. The handout on the building level team suggests what a typical team might look like, but it is important that any team be specifically designed around individualized needs. The team should not be forced to look like a model that does not conform to the needs of the local school. There is a possibility that team members may need information on the collaborative process and help in developing collaborative skills. These are not necessarily natural attibutes, but they can be acquired skills. Finally, it is important that all team members share certain assumptions in order to work effectively together towards the common goal of full inclusion. Some assumptions developed by Rainforth, York and MacDonald, are listed in CollaborativeTeams for Students with Severe Disabilities (1992).

DIRECTIONS

Show and discuss overheads on Building Level Teams, Instructional Planning Teams and Foundations of Collaborative Teamwork.

MATERIALS

Handouts/Overheads:

1. Building Level Teams
2. Foundations of Collaborative Teamwork

INCLUSIVE EDUCATION

MATERIALS

Topic: Site Team Planning (45 min.)

11:15
DIRECTIONS

Ask participants to take the next 45 minutes to meet as a school site team to discuss information presented to this point. Provide NCR Action Planning worksheets and suggest that the team examine:

1. *how they will ensure good modeling at the school site.*
2. *how they will begin to establish collaborative teaming structures and processes at the site.*

12:00
LUNCH

NCR Action Planning worksheets

Neary, Halvorsen, Gilbert &Terry-Gage, PEERS, 1992.

INCLUSIVE EDUCATION

MATERIALS

Topic: Presentation on a Family Perspective on Full Inclusion (45 minutes)

1:00 PM
DIRECTIONS

Trainers should involve a local parent whose child is involved in a full inclusion program to share their experiences as a family with inclusion. Participants will be interested in how student needs are being met in the general education classroom from the parents' perspective, friendships inside and outside of school, their perspective on community based programming and the impact of inclusion on the familiy and the community.

TRAINER'S NOTES

We have the opportunity today to hear from someone who is directly affected by inclusion. Bonnie Mintun's daughter, Anna has been included since preschool and is now about to enter the third grade. Bonnie and her husband Tim, along with other parents in Davis, California worked very hard to establish the inclusion program there, meeting with a variety of obstacles and working collaboratively with the people in her community.

We've asked Bonnie to share with us the background of the program, the challenges they've faced and the impact this program has had on Anna, her family, her friends, her school and her community.

DIRECTIONS

Following Bonnie's presentation, ask for any questions participants might have. Trainers might also ask questions they may feel the audience may be unwilling to ask for some reason or encourage these questions. This is a perfect opportunity to remind the group about the real goals of our services, to support the participation of our students in their communities.

2:15
BREAK

Overhead projector
Slide projector
Handouts:
- Davis Enterprise article
- Special Edge article "Rafael"

371

370

INCLUSIVE EDUCATION

Topic: Friendships (60 minutes)

2:30 P.M.
TRAINER'S NOTES

This module will address the importance of friendships for children. in particular, the importance of friendships for children and adults with severe disabilities.

DIRECTIONS

The first activity to do is a large group brainstorm. On a chart stand in front of the room, have written, "What is friendship?" Have the group generate a list together. The trainer writes as the participants make their list. (Approximately 5 minutes)

Ask the group to take a minute to look at the list and think about their own friendships.

Read to the group the story about the two brothers, "No Relatives, No Friends, Nothing to Do" (O'Connell, M. 1988).

TRAINER'S NOTES

When we think about the story we can understand the benefits of having friends. Relationships and friendships are important to all of us as human beings.
In the past, children and young adults with severe disabilities have had difficulty developing relationships. This was due,in part, because they were in settings where their only peers were also others who had disabiliites. Today, an inclusive school model provides opportunities that in the past, may not have been available. Friendship is an elusive, yet familiar concept to all (Perske, 1988). It is a concept that we value and desire, yet hard to define. Friendship means different things to different people and changes over time. If we look at the list (refer to wall chart) you can see we all have some different and some of the same ideas about the concept of friendship.

MATERIALS

Chart stand
paper
pens.
"What is friendship" on chart paper.

"No Relatives, No Friends, Nothing to Do".

Friendship packet

Recommended Articles:
"Developing and fostering friendship". Grenot-Scheyer, Coots & Falvey. (1989).
"Friendship as an educational goal". Strully & Strully. (1989).
"Encouraging peer supports & friendship". Stainback, Stainback & Wilkinson. (1992)

MATERIALS

Topic: Friendships (Con't.)

TRAINER'S NOTES (con't.)

A definition of friendship that's familiar to educators is that friendship is a bond between two individuals that is characterized by mutual preference for one another, a positive affective style, and an ability to engage in social interaction and to have interactions that last over a period of time (Hartup, 1975; Howes, 1983)

Put definition of friendship on overhead or flip chart

Friendships last over time, are complex, and are essential to all of us. If you think about it, we often take friendships for granted. We often do not think about a friendship until that friend is gone or the relationship changes with time.

Friendships come in a variety of packages and are different for all of us. We all have friendships, but how do we develop them? There is no recipe for making friends. It is an art, not a science. Friendships need to be developed and fostered. So, how do we do that?

Much of what we know about friendship comes from the literature describing the friendships of typical children and adolescents. Based upon this, the major prerequisite for the development and maintenance of friendship is opportunity (Hartup, 1975; Howes, 1983). Opportunity consists of proximity and frequency which allows children to practice and elaborate upon skills (Lewis & Rosenblaum, 1975), to get to know one another (Asher, Odem & Goltman, 1977), and develop friendships. Children need opportunities to interact with one another for friendship to develop. Having children with severe disabilities attend segregated or self-contained settings limits those opportunities that allow friendships to develop. "The greatest barrier to friendship between individuals with without severe handicaps is the lack of opportunity, and not individual characteristics, skills, abilities, and/or disabilities" (Grenot-Scheyer, Coots & Falvey, 1989, p.341).

Flip chart or
overhead:
Opportunity
a. Proximity
b. Frequency

Everyone needs to learn the skills necessary to interact with one another and to get along in the community. Opportunities to practice and rehearse social interactions that occur in multiple settings and over time enhance the development of friendships between children; those with and without disabilities. Friendships are characterized by a variety of social interactions.

INCLUSIVE EDUCATION

MATERIALS

Topic: Friendships(Con't)

TRAINER'S NOTES

Four types of interactions have been identified: Proximal, Helping, Service and Reciprocal.

Proximal interactions are those types of interactions in which children are near or around one another (like on the playground or in a classroom), but the children are not directly interacting with one another.

Helping interactions are probably the most frequently observed between children, particularly younger children. A helping interaction is characterized by one person voluntarily helping another. Children helping to push a friend's wheelchair or helping put a straw in their friend's milk carton during snack time are examples of a helping interaction.

A service interaction is characterized by an interaction between two people where one person helps another as a function of employment. A personal attendant for a person who has multiple challenges who is fully employed is one example of a service interaction. The attendant assists the young man in his personal needs (hygiene, mealtime, clothing) during the course of the work day.

Reciprocal interaction occurs when both persons freely give and take within the relationship. For example, Sharon, a 9 year old girl with severe disabilities, and her friend Melissa enjoy playing computer games together. After school they walk home together since they live in the same neighborhood. Friends engage in different types of interactions. This example illustrates reciprocal and proximal interactions. All of these types of interactions are essential and no single type of interaction is more important than another.

DIRECTIONS

Have the participants complete "Why are friendships important?" and "A look at my friendships". (Approximately 5-7 minutes). List thoughts about the importance of friendships in their lives and draw a symbol that best represents what friendship means to them,

Flip chart or
overhead:

Proximal
Helping
Service
Reciprocal

Slides depicting examples of proximal, helping, service and reciprocal interactions

Paper
Colored pens

INCLUSIVE EDUCATION

	MATERIALS
Topic: Friendships (Con't) **DIRECTIONS** *After they have completed the exercises have them share within their small groups (or create small groups). (Approximately 5-7 minutes).* *Then ask for three (3) volunteers to share their symbol of their friendships with a friend and discuss.(5 min.)*	Chart stand to write symbols on
SLIDE PRESENTATION *Show slides of children interacting and playing together and "just hanging out". Slides should show all age groups and current best practices contrasted with those of the past.* *Slide show should last 15-20 minutes. Comments on each slide are not necessary.*	
TRAINER'S NOTES As we end, I would like you to think about this poem by Meyer Shevin.	"The Language of Us and Them"

Topic: Strategies to Facilitate Friendships - Introduction to Overall Activity (45 minutes)

3:30 PM

DIRECTIONS

Explain to the group that this will be a jigsaw cooperative learning activity similar in format to the day 1 activity on Ability Awareness. Each team or home group will count off #1-4, and go with one of the trainers to learn about one particular strategy for 45 minutes, after which they will return to their home group to share information for about five minutes each. Further information can be shared during team planning times this week and in the future.

TRAINER'S NOTES

Now that we have reviewed the critical importance of friendship in each of our lives, we need to look at how we can facilitate these relationships among students with and without disabilities. For the next 45 minutes we will be doing a jigsaw activity covering four strategies: circles of friends, peer tutoring, TRIBES, and individualized planning sessions, often called "MAPS" (McGill Action Planning - Forest and Lusthaus, 1989). Let's count off 1-4 within your teams and go to the designated areas for your expert group. After 45 minutes, you'll return to your home group and begin today's team planning time by sharing information on your expert area for five minutes each. Of course, you'll want to spend more time on each of these strategies as your team works on its inclusive planning, and each of you will serve as the resource person for your strategy in the days ahead.

Group 1 - Circles of Friends

DIRECTIONS

Bring group's chairs into a circle. Ask if anyone is familiar with the strategy or has used it before. After providing overview information (5 minutes) have each participant do their circle (5 minutes). Discuss circles and how the strategy can be used in inclusive classrooms (10 minutes). Generate list of any concerns or issues and discuss them (10 minutes). View excerpt of ***With a Little Help from My Friends*** *(or your own tape of a circle), a tape which shows circle activity (10 minutes). In closing, ask participants what their first steps would be in utilizing circles in their program (5 minutes).*

MATERIALS

Four overhead projectors and screens/wall space.

Three VHS playback units (or share among three groups: tutoring, circles, and individualized planning sessions).

INCLUSIVE EDUCATION

MATERIALS

Topic: Strategies to Facilitate Friendships - Circles of Friends (cont.)

TRAINER'S NOTES

Overview:
How many of you are familiar with the circles of friends strategy (if any)? How have you used this with students who have disabilities and/or nondisabled students? (Response) Here's a quote from Judith Snow (1990) who is one of the advocates and originators of circles of friends:

"If society is to provide for the participation of all people, and if all people are to exploit their gifts completely, then many groups and environments in society must be places where dreams are heard, gifts are discovered, and interactions are renewed… Members of every sort of social group and structure must be invited to directly encounter a person in need of support and to experience the power of that person's dreams and gifts." (P. 224)

In the past, when students were mainstreamed into general education, we often heard about "failures" of integration - the isolated student, the student with no ongoing relationships with his or her peers. When we look at these examples, we usually find that no specific positive efforts were made to facilitate those relationships. Perhaps people simply lacked ideas about how to go about this. We all know that there may be many students who are isolated or felt isolated within their classes and the students may be "typical" kids as well as those with "differences". *Circles* are a way of generating a support system around a student or students for whom this is not naturally developing. We hope that this formalized system becomes more of a natural support system with their peers as they acquire more information about each other and share activities daily. The circle activity can also be a way of providing *ability awareness* information at the same time, without stigmatizing the person. It's important that circles are introduced in a way that doesn't set the student apart. For example, when demonstrating the circle activity, you might talk about it in the context of any student who is new to a school, and may not yet have had the opportunity to establish friendships. Let's each do our own circles now, as if we were in a classroom where the activity were being introduced for the first time.

DIRECTIONS

Hand out circle sheets. Have copy of overhead projector. Follow steps as outlined, asking participants to fill in each circle.

Schools Are For All Kids (SAFAK), 1991, Circles of Friends activity

MATERIALS

Topic: Circles of Friends (cont.)

TRAINERS NOTES

(After each completes circle) Would anyone like to share theirs? (Response) Who did you find you were placing in your first circle? What types of friends came in your second and third circles? How about in the paid category? (Responses and discussion)

What would you expect to see for students you have known who have severe disabilities? (Response) Have you seen differences for students who have been included versus those who have not? (Response and discussion) Let's talk about how you would do this activity with classes where students are included. (Discussion) How would you close the activity? Would you ask students to volunteer to participate in "Katy's" circle for example, and suggest specific roles like calling her on the phone at home or eating lunch together? What do you think about circle meetings where students would problem-solve and plan activities with "Katy"? (Discussion)

Let's view a few minutes of students doing and discussing circles.

DIRECTIONS

Show videotape.

Tape: "With a Little Help From My Friends" (Expectations Unlimited, 1989)

VHS unit

Easel and chart

TRAINERS NOTES

Did you like what you saw? What did you especially like? Did you have any concerns about the circle activity or the discussion? Lets brainstorm a list of considerations regarding *circles* and discuss ways to address those.

DIRECTIONS

Generate list and strategies on chart with group.

MATERIALS

Topic: Circles of Friends (con't.)

TRAINER'S NOTES

(In closing) We've had a brief overview of this one strategy for facilitating relationships among students. Circles can be both an awareness and a friendship-building strategy, particularly when used in conjunction with the other strategies that your teammates have learned about today. We hope you'll have fun sharing that information this afternoon.

Topic: Strategies to Facilitate Friendships: Tribes (45 minutes)

3:30 PM
TRAINER'S NOTES

The purpose of this session is to acquaint the participants with a strategy to promote inclusion and foster friendships between children.

DIRECTIONS

Have the particpants sit around a table. Hand out the ***Tribes*** *packets. Explain to them that we will review briefly the information, then experience a few "Tribes" activities.*

TRAINER'S NOTES

Tribes is a process to enhance and foster positive social development and cooperation among students. Typically in our schools, there are two curriculums: manifest and latent. The manifest curriculum is reading, math, and science. Historically, these curricular areas were specifically addressed in the classroom setting. The latent curriculum is the less obvious. The areas included are social interactions, peer relationships, friendships, and positive personal regard. The latent curriculum is not always included in formal curriculum development, but it is no less important to the development of children.

We often observe in schools children with low self-esteem, anti-social behavior, disrespect for teachers, depression and alienation. Clearly, addressing only curriculum specific topics such as math and science will not help our children in the life-long learning experiences and development of positive social skills.

We need to help our schools identify strategies to promote positive peer interaction. Our schools need to promote positive peer regard, cooperative, not just competitive learning opportunities and a positive classroom climate to enhance motivation and improve student behavior. The educational process will assist children to meet the challenges of the world beyond the school setting. Children who develop

MATERIALS

Handouts:
1. Tribes packet

2. Tribes Activity packet

TRIBES. A process for social development and cooperative learning Gibbs, J. (1987), may be ordered by calling: Interactive Learning Systems- 415-332-2034. Parts of the above document (not included here) will be required for this activity.

Topic: Strategies to Facilitate Friendships: Tribes (con't.)

TRAINER'S NOTES (con't)

pro-social skills and attitudes feel better about themselves and others, and have a positive sense of self-esteem. Pro-social skills will provide children without disabilities to relate to others, respect others and demonstrate a sense of responsibility for themselves and others.

Tribes is a process for social development and cooperative learning. A Tribe is a group of five or six children who work together throughout each day throughout the school year. Usually, the tribe sits at the same table in their classrooms. The types of activities that the tribe engages in fall into three categories:

1. Sharing personal concerns, feelings and positive regard for one another;
2. Planning and problem-solving;
3. Working cooperatively on curriculum assigned by the teacher.

The teacher determines who will be in each tribe even though the students can name friends that they would like to be in their tribe. The tribes are formed sociometrically to distribute boys and girls, students of high and low peer acceptance and ability, and children with unique differences or challenges.

The teacher never participates in the groups, but acts as a facilitator. The teacher gives directions, sets time limits, and maintains control by intervening only when necessary. The teacher " recognizes that responsibility must be transferred to the students to manage the tribes so that peer support enables the achievement of the program goals" (Gibbs, p.19)

DIRECTIONS

The goals of the Tribes Program and the Tribes Norms are in the Tribes activity packet. Refer to these pages. Read the Tribes Goals, discuss and provide opportunity for discussion.

Read each of the Tribes Norms and discuss and provide opportunity for discussion.

MATERIALS

Tribes packet:

1. Tribes Goals
2. Tribes Norms

Neary, Halvorsen, Gilbert & Terry-Gage, PEERS, 1992.

MATERIALS

Topic: Strategies for Facilitate Friendships: Tribes (con't.)

TRAINER'S NOTES

When discussing and reviewing *Tribes* "Goals" and "Norms", weave in information and references to positive peer relationships, and how opportunities to interact are critical for friendships to develop and thrive. *Tribes* is an inclusion process for all children, including those children who are not "popular", always last to be picked for teams or ostracized by others. Building positive peer regard and self-esteem will encourage children to be helpful, empathetic and understanding of all differences and diversity.

To get children working together and caring about one another, there are several tribal community building activities in the "Tribes" book that can be used. Directions for each activity identify the age group for which the activity is appropriate; the materials needed, and the amount of time required for each activity. (Gibbs,

DIRECTIONS

Tell the group they will now have an opportunity to participate in several of the team building Tribes activities. The first activity is called "Spider Web".

Ball of yarn

Have the group sit on the floor in a circle. Begin by informing the group that this is an activity that helps children get to know one another. You will begin the activity by rolling the ball of yarn to someone across from you in the circle, but before you roll the yarn, you must tell your name and something about yourself you wish to share with the group, (for example, My name is Susann and I like to water ski".) The next person then repeats this by holding one end of the yarn and rolling the yarn across to someone else, telling something about themselves. The important thing is to remember the name of the person who rolled you the yarn and what they shared with the group and to hold onto your end of the yarn.

Everyone takes a turn rolling the yarn, sharing their name and holding onto the yarn. After the last person rolls the yarn, there should be a big criss crossed network of yarn connecting everyone to each other.

Neary, Halvorsen, Gilbert &Terry-Gage, PEERS, 1992.

MATERIALS

Topic: Strategies to Facilitate Friendships: Tribes (con't.)

The last person then starts the yarn ball in reverse. He rolls the yarn to the person who last rolled it to him. Before he rolls the yarn back, he says the person's name and what they shared about themselves with the group. The yarn makes the reverse journey unwinding the spider's web until it ends up with the person who initially started the yarn ball rolling.

The next activity is called "My name in print". Participants take a piece of paper and print their names vertically. The name tags are then placed about the room. Participants are instructed to walk around the room and write on each name tag one time. They are to write an adjective describing the person. The descriptive adjective must begin with the letter of the name they select (example: B right; E nergetic; T ough; etc.) The activity ends when all the letters in everyone's name are filled with adjectives (Some people may need to write on an individual name tag more than once).

Cut 8-1/2 X 11 colored paper in half or cut up file folders in long strips.
Marking pens

B
E
T
T
Y

The group then returns to the circle. Individuals are asked to share the adjectives written about them on their name tag.

The last activity is called "Bumper Stickers". Pass out the bumber sticker-sized paper. Have the participants make up their own bumper stickers. Ask them to share their bumper stickers with the group and what they mean.

Half sheets of paper or tag board

Markers

TRAINER'S NOTES

Concluding remarks: These activities promote social interaction and cooperation among children. Tribes is a process to build these positive skills among children and it can be a valuable tool to promote relationships and foster friendships.

Topic: Strategies to Facilitate Friendships: Peer Tutoring (45 Min.)

3:30 PM
TRAINER'S NOTES

At this time, we would like to consider *peer tutoring* as a strategy to facilitate friendships. Some people have said that *peer tutoring* cannot be used to facilitate friendships at all since the *peer tutoring* relationship is inherently hierarchical. Therefore, there is always an imbalance in the relationship preventing the developing of reciprocal friendship. However, it has also been pointed out that, in fact, true friendships do develop out of hierarchical relationships. There have been many friendships that have grown between a boss and a subordinate. It is our position that *peer tutoring* is one strategy that is useful to help friendships grow, and this is the assumption we make as we explore *peer tutoring*.

There are several objectives that we would like to achieve as we discuss *peer tutoring*. The first is to develop a rationale for putting peer tutoring programs in place. The second is to generate some issues surrounding peer tutoring and to explore ways to deal with those issues. The final objective is to list some ideas on what really makes peer tutoring programs successful.

To get started on developing a rationale, let's watch a few minutes of a CRI video on peer tutoring in the Alameda and San Francisco Unified School Districts of California, in 1983-84, long before inclusive education was a visible option.. At this time, the students you'll see were attending special classes within age-appropriate regular schools.

MATERIALS

Handouts:
Peer tutoring
"possibilities"

Topic: Strategies to Facilitate Friendships: Peer Tutoring (con't.)

DIRECTIONS

At this time show excerpts from CRI's "Getting Together" video. Use the excerpts to generate a discussion of a rationale for using peer tutoring programs. Try to ensure that the following points are made:

1. *Bringing students together provides opportunities for interactions.*
2. *Peer tutoring enables teachers to effectively accomodate a heterogeneous group of students within the general education classroom.*
3. *Peer tutoring may have a positive effect on the self-esteem of the tutor.*
4. *There may be a positive effect on the attitudes of peers towards students with disabilities.*
5. *Peer tutoring can provide increased motivation for students with disabilities who learn more in activities that involve direct interaction with general education peers.*
6. *Peer tutoring is a strategy that has been used effectively within general education for decades. In current edcuational reform, peer tutoring, coaching and advocacy are critical elements.*

MATERIALS

Video: CRI's "Getting Together" (1984) Peer tutoring section.
VCR and monitor

MATERIALS

Topic: Strategies to Facilitate Friendships: Peer Tutoring (con't.)

TRAINER'S NOTES

Any educational strategy raises certain issues about which educators need to be aware and consider in planning. The handout on peer tutoring "possibilities" is designed to help you focus on what some of the issues on peer tutoring might be. We should spend some time discussing this handout now.

DIRECTIONS

Have participants work in small teams. Give them time to read and discuss the handout. Together they should analyze the issues involved in each situation, and try to come up with some strategies to deal with the issues. Once people have had time to finish the task, follow with a group discussion about each "possibility". Use chart paper to record solutions. Some guidelines for each "possibility" follow.

Chart paper
Easel
Marking pens

TRAINER'S NOTES

1. The issue is that peer tutoring is being used as the sole vehicle for interaction with peers. A possible strategy to deal with the issue is to work at providing a variety of interaction opportunities. (Circles, Tribes, MAPS, extracurricular inclusion, etc.)
2. The issue that tutors are being used as "little teachers". A strategy to deal with this might be to provide initial instruction to students with disabilities before a peer tutor comes in to work, and then to provide better structure and support throughout the peer tutoring program so that reciprocal interactions are encouraged, rather than teaching sessions only.
3. The issue is that the "balance of power" between the peer tutor and students with disabilities always rests with the tutor. The tutor is always the instructor/helper. There might be several strategies to deal with this. One might be to stress for all students the benefits of developing friendships in addition to the tutorial aspects of the relationship. Another might be to choose activities for the students that are of a recreational/leisure nature. A third might be to give the student being tutored more control over choices of activities, length, location etc.

Topic: Strategies to Facilitate Friendships: Peer tutoring (Con't.)

TRAINER'S NOTES (Con't.)

4. Students with disabilities in this situation are always seen as needing help. Again, there are several ways that this might be handled, but one suggestion is to establish peer tutoring programs within the context of school tutoring projects that are already in place. Then students with disabilities are not in a position different from anyone else participating in those programs. In addition, students with disabilities can also participate as tutors in these programs (eg. student who has sight word vocabulary assists student with limited English in word recognition activity).

Now that we have an idea of the reasons for having *peer tutoring* programs at all, and now that we are aware of some of the things to watch for in developing peer tutoring programs, here are some thoughts on what really makes peer tutoring successful (taken from Sailor, Anderson, Halvorsen, Doering, Filler and Goetz, The Comprehensive Local School, 1989).

1. Creating opportunities and structuring interactions
2. Focusing on social skills for students with disabilities
3. Providing accurate information to non-disabled students and general education staff
4. Modeling age-appropriate, respectful interactions with students with and without disabilities
5. Providing activities and materials that allow students to demonstrate competence and to participate in meaningful ways across different environments.
6. Providing a highly structured format with good training and support for the tutors

Having each of these elements in place will help ensure that *peer tutoring* programs accomplish the purposes for which they are put in place, including the intention to help facilitate friendships.

4[illegible]3

4[illegible]2

MATERIALS

Topic: Strategies to Facilitate Friendships: MAPS (45 minutes)

3:30 PM
TRAINER'S NOTES

In looking at friendships, we've identified what we mean by "friendship" and some of they ways that friendship is shown or manifested. We've also discussed some of the ways that educators and families might facilitate friendships simply by how we bring people together.

When people have been separated, it is often necessary to do more, however, to get things started. How do we break the ice? How do we help people get beyond the perceived differences and get to know each other? It may be important to begin with a process called MAPS, or the McGill Action Planning System, (Forest & Lusthaus, 1990). MAPS involves calling together a group of people who are important in the life of a particular student to collaboratively support that person in being a valued member of their community. Typically, the family, teachers, relatives, friends meet to share thoughts, ideas and commitment to support this person.

The process of MAPS is what is important. Special education has at times become so specialized that it's actually prevented others from the community to be involved. There is often a mystique about special education and special educators are sometimes perceived as the only ones who have the skills to deal with people with disabilities. MAPS recognizes the power of community and the ability and willingness of others to become involved. The ideas for supporting their friends are often far beyond those generated in typical IEP meetings.

Overhead of a student's MAPS process - see Mike's map (Tweit & Souza, 1990)

The process begins with introductions and an explanation of why everyone is there. Family members are asked to share some stories about the student that will provide a bit of a historical perspective for the group.

Next, each member of the team is asked to share their dreams about the student. It is particularly important for members of the group to hear what the student's, parents'and sibling's dreams are.

It is also important for members to say what they are most afraid of. The group facilitator asks for each person to say what their nightmare for their friend is.

Topic: Strategies to Facilitate Friendships: MAPS *(Continued)*

Following nightmares, the group talks about who their friend is, by sharing words or thoughts that describe her. Some of the comments are surprising and encouraging to families and professionals who may have focused so much on disabilities and needs as to forget the other qualities a person has.

In line with this positive emphasis, members get an opportunity to talk about the person's strengths, gifts and talents. Again, friends, particularly children, see things we often don't.

By this time, each member of the group knows far more about the student and has a much better appreciation for them. They also have a better idea of what will truly support the student to be a valued member of the community, both in school and outside. Group members share ideas on what the person needs to be included, valued and successful.

All of the preceding steps essentially set up the final portion of the process, which is to establish specific actions and responsibilities to ensure success for this person. Members of the team, since they've been part of sharing their thoughts and beliefs and since they've committed their time and energy through this process, are interested in ensuring their friend is successful and welcomed. The group identifies who will do what.

DIRECTIONS

As the participants are able to examine each of the area of MAPS, ask for questions or comments about the process. Discuss how such a group might be organized; the importance of doing this with friends who have had a chance to get to know the student. For example, this would not be done in the first week of school. It would also be important to discuss the ethics of this process. Should the student be present? Will s/he be comfortable? Should this process only be done for students that are labeled? How can we avoid calling undue attention to a person when her friends do not see her as so different? If members of the school site team are familiar with a particular student being included, they might be encouraged to try this process among themselves during the institute week. Provide exercise materials for a MAPS role play. Team members can each take a role and with the session trainer facilitating, hold a model MAPS meeting.

Danny's MAP
(Roger, B.; Gorevin, R.; Fellows, M.&
Kelly, D. SAFAK, CRI, 1991)

INCLUSIVE EDUCATION

MATERIALS

Topic: Site Team Planning (45 minutes)

4:15
DIRECTIONS

At this point, have teams take the next 45 minutes to meet. The task is to share information from the "expert" friendship groups, to discuss the other information presented during the day and address it in their action planning.

Suggest to the teams that trainers are available to meet with teams if they choose and that they are welcome to meet wherever it is comfortable.

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DAY 2
Group Activity

TEACHER MODELING SITUATIONS

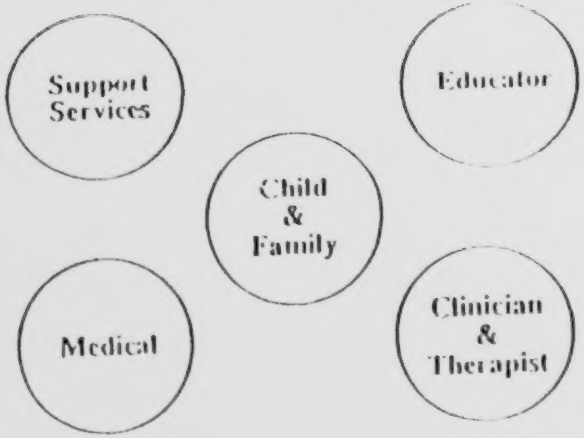
1. You are on the playground at recess with three elementary age students who have severe disabilities. Jennifer, one of these students, has never used a slide before. She is standing near the slide and looking at it, when a non-disabled student approaches her and begins to steer her onto the slide ladder. You know that Jennifer has poor coordination problems with grasping, and often does not seem to look at what she is doing.
You____

2. You are in the high school cafeteria. Bill, a student with special needs, begins screaming for no apparent reason. In the past, when this was ignored, he's stopped. However, here, the non-disabled students are coming over, asking questions, staring, covering their ears, etc. and you worry that the behavior will not diminish. Your one aide is absent so you are unable to take Bill out of the cafeteria, since this would mean leaving other students unsupervised.
You____

3. Students are lining up to go to the assembly. Friends are walking with students with disabilities or assisting them by pushing their wheelchairs. Joe is exhibiting "self stimulatory" (in our jargon) behavior. His new friend asks, "What's wrong with him?"
You____

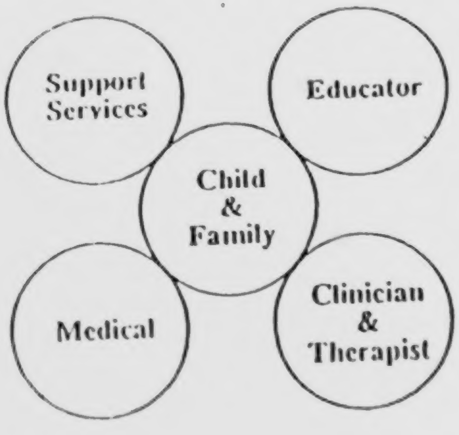
4. Susan, who participates with two other students with disabilities in chorus, has a toileting accident in the midst of the activity.
You____

Halvorsen, A. (1986; rev. 1992)
CSUH/PEERS Project


Support Services
Educator
Child & Family
Medical
Clinician & Therapist

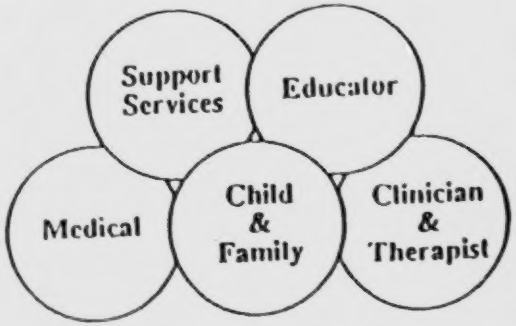
Multidisciplinary Approach

Each professional works independently with the child and family. Observations and information may be exchanged during staff meetings. Each discipline decides on and carries out their own recommendations. Family members interact with each professional separately.


Support Services
Educator
Child & Family
Medical
Clinician & Therapist

Interdisciplinary Approach

Professionals work jointly with the child and family, but specific discipline roles are maintained. Observations and information are exchanged during formal meetings. Group decisions are made, but staff roles determine who will carry out recommendations. Families work with several different professionals, who maintain their discipline roles.


Support Services
Educator
Medical
Child & Family
Clinician & Therapist

Transdisciplinary Approach

Professionals and family members work together. Professionals and family members exchange information and observations and train each other in their area of expertise. Recommendations are jointly arrived at, roles are integrated, and a total program is provided for the child and family.

Adapted from: Wisconsin Department of Public Information, Teaching Early Childhood Exceptional Needs: Ten Resource Modules, 1979.

A BUILDING LEVEL TEAM

Purpose: Supports full inclusion at the site; involved in problem solving and sharing successes.

Issues:
School-wide commitment:
Class placements:
Setting initial daily schedules:
Identifying and encouraging peer supports:
Supporting positive behavior change:
Creating planning time

Membership:
Parents
Principal
General education teacher
Special education teacher
Designated Instructional Service representation
District level representation
University or state level consultant

Size: 6-8

Meetings: Monthly or less

Foundations of Collaborative Teamwork

Table 2.10 Assumptions of a collaborative teamwork approach to education and related services for students with severe disabilities

1. All students can learn given the opportunity and appropriate support.
2. The desired educational outcomes for all students are participation in, contribution to, and enjoyment of family, school, and community life, now and in the future.
3. All students, regardless of abilities, interests, and needs, must grow up and learn together in the same school and community environments in order to achieve desired educational outcomes.
4. It is the explicit responsibility of the collaborative educational team to assist students in achieving desired educational outcomes.
5. The collaborative team is comprised of the student, significant family members, friends, and the education and related services personnel required to assist students in achieving desired educational outcomes.
6. Positive social interdependence among team members must be structured to realize the benefits of collaborative teamwork.
7. Discipline-referenced knowledge and skills are shared among team members so that relevant expertise is available to students in all aspects of their educational program.
8. An ecological curricular design is required to assist students in achieving desired educational outcomes.
9. An Individualized Education Program (IEP) is developed jointly by the collaborative educational team and reflects an integrated approach to service, design, and provision.
10. Collaborative teamwork strategies must remain flexible in order to meet changing needs of students and families.

From Rainforth, B., York, J., and Macdonald, C.,
Collaborative Teams for Students with Severe Disabilities,
Paul H. Brooks Publishing Co., Baltimore, 1992

Enterprise photos/ Alison Portello

ide Janet Kremarik adjusts headphones for nna Hoban, so the second-grader in Barbara rankel's class at Valley Oak Elementary School can listen to a story while reading along. Above, Amber Sweatt shares a quiet moment with classmate Anna on the school playground.

All together now

Making differences ordinary is goal of education philosophy for special-needs kids

By KATHY ROBERTSON
Enterprise staff writer

Second-grader Megan Kramer likes her friend Anna Hoban because she's fun to play with. She can roll a ball, she's not heavy and she "doesn't need to wear contacts like my mom does."

Megan stood up during sharing time last week to talk about a summer trip to Clear Lake. She showed pictures of her family and Anna's playing together in a boat.

The two girls sit side by side in Barbara Frankel's class at Valley Oak Elementary School. Anna's desk is at the end of the row so her wheelchair can be moved alongside the other children if she needs the extra support.

Anna is one of [illegible] severely handicapped youngsters attending regular neighborhood schools in Davis this year. She receives support services from the county Office of Education through itinerant teacher Linda Brooks or an aide. Not long ago her only educational option would have been a special school in Woodland.

In 1987, Anna was one of six youngsters to buck the norm of segregation for children with special needs. An active group of local parents urged the opening of a new preschool program at the Early Childhood Lab on the UC Davis campus so their children could go to school and make friends in their own community.

The opening of regular school sites to children with special needs follows a state law passed more than 15 years ago dictating that schools move toward education for all students within the "least restrictive environment."

After a successful year at ECL, Anna went on to kindergarten and then first grade at Valley Oak. She's in Frankel's class this fall at the teacher's request. Frankel said she's been interested in Anna since she watched her begin kindergarten.

"At first I saw her being wheeled down the hall. Then, toward the end of the year, I saw her walking sometimes. It was so exciting. I felt she had done something remarkable," she said.

"During first grade, I saw her develop a group of friends. She does wonderful things to other children. They all approach it differently, but they all think about what she needs — and she's made incredible progress."

Frankel added that she doesn't do a whole lot of worrying about Anna; she just treats her as part of her class and the school.

Either Brooks or aide Janet Kremarik are in the classroom working directly with Anna most of the time. When they are absent, they arrange an activity to keep her occupied and learning. Children get up periodically to hand her a puzzle piece or stop to watch her progress on a task, just as they stop by to look at another classmate's work.

Last week, students were drawing pictures of their families. Seated at her desk, Anna worked to hold onto crayons and do her own picture. A special easel held the paper at a slant and Anna received help from Kremarik.

"Anna's really just another child doing what she's doing at her own level — which is what all children do, because any class has a range of abilities," said Frankel.

Frankel has 30 students, which is large for a combination class (she has both first- and second-graders). While acknowledging that Anna's aide and equipment impact space, Frankel couldn't think of any negatives to the arrangement.

Referring to fear among teachers in the district when there was talk four years ago about moving severely handicapped youngsters into regular school classrooms, Frankel said, "We didn't know what to expect."

There was enough concern among teachers to form a committee in 1989-90 to study the issue. Teachers were never against the concept of full inclusion, but they worried about whether adequate support services were in place.

Chad Thorgerson, president of the Davis Teachers Association, said the matter is still a concern but the severe problems first anticipated never materialized. Teachers had worried about responsibility for medical and custodial care (such as toileting, feeding and lifting), as well as a need to spend extra time with the disabled students. Brooks or her aides have taken care of these matters.

"We haven't had the severe problems anticipated — and frankly, when the budget crunch took over, this got lost in the shuffle," he said.

"We still feel it impacts the program, but this has certainly been lessened by the great parents who have put in a lot of time to make it work."

From Frankel's perspective, the program "has evolved into a situation with the least restrictive environment fitting the needs of both the children and the teachers."

Brooks said the reception in Davis schools has been both welcoming and supportive. There are 10 children enrolled in regular classrooms at the

> "Children with disabilities ... are no longer seen as kids who need to be 'fixed.' I'm no longer waiting for Anna to be 'cured.' "
>
> —Bonnie Mintun, Anna's mother

See STUDENTS, Page C

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Continued from Page C-1

school sites this year: four at West Davis Elementary, three at North Davis and three at Valley Oak.

"The program revolves around the type of experiences they are able to have in a regular school setting that are hard to duplicate in a segregated school," said Brooks.

"Every classroom has at least 30 role models and the progress of our children has gone way beyond expectations. They are picking up new words and gaining an understanding of the basic things in everyday life. We are amazed every day at the growth these children are making — I feel strongly this is the very best environment for all kids."

The experience works two ways as non-handicapped children learn from daily interaction with those who have special needs. Kids tend to be more accepting of differences than adults, Brooks said.

She referred to a "circle of friends" activity held for fourth- and fifth-graders last week. Youngsters talked about what it would be like if they were unable to ask another person to go play ball. Some suggested they might feel lonely; others said they might feel sad or angry.

"What comes out of this kind of activity is a level of support for our kids," said Brooks.

Yet social progress is not all that's going on. Attention is also paid to academics. Brooks said students work on sight recognition of words, math calculations, how to stay on task and follow directions. There has been marked improvement by all students.

Parents who pushed four years ago to have their children attend regular school sites and achieve acceptance in the community have been pleased with the success of the itinerant teacher program.

from an attitude of "why" to "how", it's now a given that full inclusion makes sense, so work has shifted to how to make it work the best. There is no manual for how to move ahead, so parents and teachers are problem-solving as they go.

"It's new that people are proud of the accomplishments their children with disabilities are making," Mintun says. "They are no longer seen as kids who need to be 'fixed.' I'm no longer waiting for Anna to be 'cured.' I'm proud of her sweet personality, and don't think of her as someone who needs to be improved."

"We are amazed every day at the growth these children are making — I feel strongly this is the very best environment for all kids."

—Linda Brooks, Itinerant teacher

There has also been a shift from learning to cope with special kids to learning to get to know them as human beings, Mintun said. Children, who tend to be more accepting of differences than adults, have led the way.

Toni Cooper's daughter Tristan has been friends with Anna for years. Now they go to school together.

"I think it's wonderful for the children without disabilities. My daughter accepts Anna and has never — ever — asked what's wrong with her," she said.

"It's a great experience for children to see that others with disabilities are functional, not outcasts. This is different from when I was young, when seeing a child without an arm or in a wheelchair was something frightening. I'm proud of my daughter's relationship with Anna."

elsewhere. Visitors have come from across the globe to see how it works; families across the county would like to become more involved. According to Holly Anderson, principal of Greengate Center for Exceptional Children in Woodland, several children are waiting for an opening. She hopes to add a few more to the program this year.

"I think it's been outstanding. Things are going very well and I give 99.9 percent of the credit to Linda Brooks, an exceptional teacher who is extremely committed to the kids, their families and the regular classroom teachers," said Anderson.

Continued growth appears likely. There are 10 children attending the ECL program this year and it is expected that some of these kids will want to go on to regular school sites in Davis.

According to Special Education Local Planning Area (SELPA) director Nona Kirk, preliminary plans for 1991-92 envision a doubling of the full inclusion program to accommodate 20 children. This would mean hiring a second teacher and an additional aide.

Greengate to a special day classroom at Maxwell Elementary School in Woodland within the next month. The idea is to gradually mainstream the children into regular classrooms as much as possible. A new high school program for severely handicapped students opened in West Sacramento this fall.

Ultimately, Mintun and others see a movement toward full integration in all aspects of community life. They'd like to see their children get support to allow participation in city recreation events ranging from gymnastics and swimming lessons to Rainbow Summer.

"Some people will need some kind of support their whole lives. That's OK," Mintun said. "We're not talking about support until they 'improve,' but supported life."

The idea of empowering individuals with severe disabilities to be fully included in the community is the thrust of a Supported Life '91 conference in Sacramento on Thursday and Friday.

The conference will provide opportunities for consumers, families and professionals to explore the concepts and realities of support services which enable people with severe disabilities to live, learn, work and socialize in the community. It also will celebrate examples in which this approach is already underway.

Sessions run from 8:45 a.m. to 7 p.m. Thursday and 8:30 a.m. to 4:30 p.m. Friday at the Red Lion Hotel, 2001 West Point Way in Sacramento. For more information about the conference, call the Area III Disabilities Board at 924-2265.

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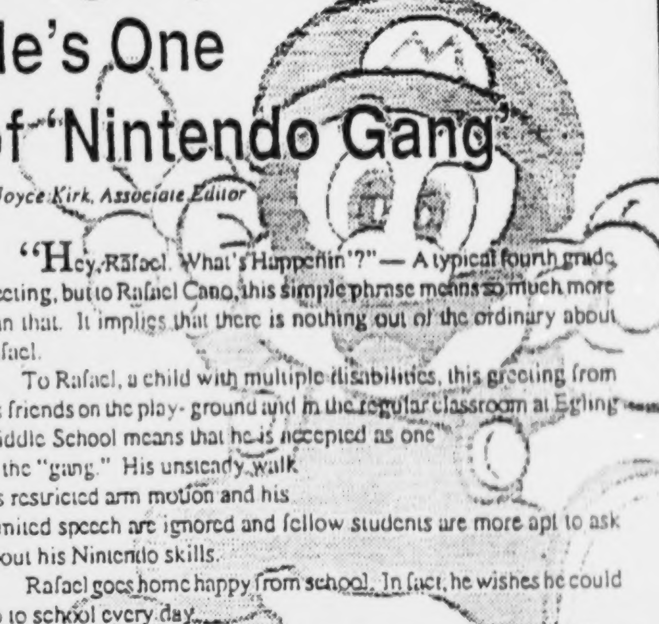
'Hey Rafael What's Happenin'?'

At Egling Middle School He's One of "Nintendo Gang"



by Joyce Kirk, Associate Editor

"Hey, Rafael. What's Happenin'?" — A typical fourth grade greeting, but to Rafael Cano, this simple phrase means so much more than that. It implies that there is nothing out of the ordinary about Rafael.

To Rafael, a child with multiple disabilities, this greeting from his friends on the play- ground and in the regular classroom at Egling Middle School means that he is accepted as one of the "gang." His unsteady walk his restricted arm motion and his limited speech are ignored and fellow students are more apt to ask about his Nintendo skills.

Rafael goes home happy from school. In fact, he wishes he could go to school every day.

This was not the case a few years ago. His mother, Alice, worried about his unhappiness. Although Rafael communicated with a few words and sounds, his physical behavior indicated stress. He was not responsive to his surroundings — his constant rocking motion and sporadic hand clapping made her realize that something was missing for Rafael. At that time Rafael had been enrolled in a segregated school site since the age of 3. He had entered the school with severe disabilities: he was on oxygen, tube fed and had limited gross motor skills. According to Colusa County Nurse Roberta Leggitt, "Prior to the age of 3 he basically filled his day rolling on the floor with little response except perhaps to clap to music." But she explains, "Slowly his medical problems improved and his body began to gain strength." It became apparent that Rafael had a potential no one expected. Leggitt remembers, for example, that the speech therapist began to work individually with him, she saw something in Rafael and realized that the interaction with the other children in his class who had profound handicaps was not providing the verbal stimulation Rafael needed.

Big Step for Rafael

When Rafael was seven he became part of a group of children transferred from the segregated school site to their home-based regular classroom sites in the Colusa County Special Education Local Planning Area (SELPA). When the Colusa school district made plans to move children, Alice was eager for Rafael to be included. This was a big step for Rafael and a major one for the Colusa County SELPA also. It meant building more classrooms and a therapy room and reorganizing services.

Debra Owens, Colusa County SELPA Director, who spearheaded the move toward integration explains, "In many cases parents, like Rafael's, wanted this move. Program staff wanted integration because the more we could incorporate special education into the regular education program the better for all the programs. When special education is run as a separate entity it isolates not only students but also staff."

Mario Brothers fan, Rafael is happy in school.

The integration option was also a practical one for the SELPA. With the growth of the special education population the isolated school sites were becoming full and it was harder to find enrollment out of county. Parents, too, were unhappy with the sometimes long bus rides experienced by their children.

For help in providing this integration option, the Colusa County SELPA applied to the PEERS (Providing Education for Everyone in Regular Schools) Project. PEERS is a statewide systems change project for integration of students with severe disabilities supporting local personnel and helping to develop expertise and resources.

Tom Neary, PEERS consultant, describes the project's service as one that works with SELPAs in a broad systems change process to develop integrated options at regular school sites but, "we are also working at the school site level so that kids like Rafael are not just there on the campus but are actually included in all of the things that happen on the regular campus."

Owens explains the PEERS role as being "supportive – it provides a structure of how to plan. It is a tool for allowing people locally to decide what they wanted to do and how to serve these children." School site teams and inservice workshops received direction from Neary and others. Agencies, teachers and district staff worked together to meet any obstacles to the integration.

Owens warns, "You need to spend time planing and making everyone aware of what is going on. You do not want to present any surprises. Teachers, parents, administration all must be included. She adds that principals play a key role in the integration process. They attended workshops to learn benefits of integration. "We are lucky that our principals are child-oriented and see the benefits."

Colusa is a no-nonsense farming community and Owens mirrors her constituents philosophy. She takes a low key approach to

continued on page 10

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Hey Rafael

continued from page 12

integration. The student population in the SELPA is 3,600 and of these 375 have been identified with special education needs. There are no complex frameworks to prepare for every imaginable need that the future might bring. "We look at the particular child and those needs. We zeroed in on our population and asked 'What do we need right now for this to work?'"

When Rafael began school on the Burchfield Elementary site he was integrated into the first grade class almost immediately. Kim Morris, the Colusa County teacher for students with severe disabilities worked at first with Rafael and five other children in a special day class and included him in some of the regular class day. "He was shy and frightened at first." But the other children never hesitated in their acceptance of him. "I answered their questions such as why he had a scar or why he talked the way he did, and soon they were talking to him and encouraging him to join in." PEERS had helped the school to conduct an "Ability Fair" to help students understand disabilities in general.

It was this interaction with children that has made the most difference in Rafael's life, explains his mother. "They talked to him and he began to use short sentences to communicate. He has learned to eat and play without as much help."

Last spring Rafael's shunt which drains fluid produced by a hydrocephalic condition became infected and resulted in his becoming critically ill. Alice feels that his classmate's heartfelt concern not only supported Rafael's spirits but her's also. Neary and Morris both point to this incident as a powerful reason for integration of children like Rafael. Says Neary, "The fact that this family got so much support from the regular education children is one of the real bonuses. Rafael has friends who know him and like him and are going to support him in his life."

Alice sees her son as eventually leading a normal life. Nurse Leggitt adds, "Rafael has come so much farther than we ever thought we would— you do not want to second guess limitations." Rafael does not see himself as "limited." He is eager to join into any activity, especially the "in" things. During share time at school he enthusiastically shares a message with his class that he knows he belongs: "I have Nintendo – I play Mario Brothers." His classmates are pleased to hear of his success. ■

BEST COPY AVAILABLE

I'd like to begin our presentation by reading you a short story which illustrates why services for individuals with disabilities are changing. This is taken from The Gift of Hospitality: Opening the Doors of Community Life to Individuals with Disabilities by Mary O'Connell.

NO RELATIVES, NO FRIENDS, NOTHING TO DO

> Jo give birth to two sons. As babies, each of them, like all babies, spent most of the time with their parents, being held and cuddled and loved. One son gradually moved off from his parents' arms to explore the world. On the street he found playmates; at school he made friends with kids in his class; at his job he joined co-workers for lunch and parties; in his apartment building neighbors would say "Hello"; he had girlfriends and fell in love. Watching it all, his mother reflected: At the beginning he had only his family, but by the time he was a young man he had surrounded himself with other people.
>
> The other son also started out in his parents' arms. But he came with several disabilities, which were given one name or another, and those problems and labels got in the way of his exploring the world the way his brother had. Instead of having opportunities to define himself the way his brother had, his labels defined him until most people could see only the problem, not the boy. Instead of family and friends gathering around him, they fell away. He went only to special schools and special programs. By the time he was fourteen, the only people he saw regularly, besides his mother, were other people with disabilities and people who were paid to give him some service. "He had," said his mother, "no relatives, no friends, nothing to do."

(O'Connell, M. (1988). The gift of hospitality: Opening the doors of community life to individuals with disabilities. Springfield, IL: The Department of Rehabilitation Services.)

PEERS

PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

PROJECT DIRECTOR

Patrick Campbell, Asst. Superintendent/Di
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3567
(916) 657-5086 FAX

REGIONAL OFFICES

Tom Neary
650 Howe Avenue
Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D.
Ed. Psychology Dept
CSU, Hayward
Hayward, CA 94542
(510) 881-3087 or
(415) 338-7849

Suzanne M. Gilbert
El Toro HS, Room 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8558
(714) 837-5066 FAX

Steve Johnson, Administrator
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3256
(916) 657-5086 FAX

FACILITATING FRIENDSHIPS

What are friendships?

- Relationships that last over time
- Complex relationships
- Essential to all social beings
- Taken for granted unless nonexistent
- Come in a variety of different packages
- Supports/Networks
- Elusive but extremely familiar
- "Art" not a science

Why are friendships important?

- Social communication skill development
- Social/Emotional well being
- Avoid loneliness
- Provide a sense of belonging to a community
- Assists in developing a more caring community

How are friendships developed?

- Close proximity and frequent opportunity
- Sharing ordinary situations
- Sharing common bonds
- Integrated Neighborhood Schools
-
    - Diversity should be a part of life
    - Schools are a microcosm of society
- Promote integration as a value not an educational strategy
- View special education as a service NOT a place
- Base services on individual needs NOT disabilities
- De-emphasize/Eliminate "separate", "special", and "pull-out" programs and services
- Highlight students' competencies, strengths, and gifts
- Foster involvement in extracurricular activities
- Use Circle of Friends/Mapping (M. Forest)
- Use team teaching, consultation, collaboration
- Use cooperative learning strategies
- Encourage participation and interdependence
- Facilitate vs. directing or controlling
- Develop school interaction or friendships project for students
- Structure seating arrangements, playground activities, hallway monitoring, position, etc.
- Use teasing as an opportunity to teach values; provide factual information, etc.
- Eliminate plateau
- Allow/Encourage parents to have dreams, hopes, and goals for their children
- Believe it
- Live it
- Teach it

TYPES OF INTERACTIONS

1. PROXIMAL

= SENSORY CONTACT ONLY

2. HELPING

= ONE PERSON VOLUNTARILY HELPS ANOTHER

3. SERVICE

= ONE PERSON HELPS ANOTHER AS A FUNCTION OF EMPLOYMENT

4. RECIPROCAL

= BOTH PERSONS FREELY GIVE AND TAKE WITHIN THE RELATIONSHIP

SKILLS OBSERVED BETWEEN FRIENDS:

- INITIATE COMMUNICATION
- THOUGHTFUL ACTIONS
- POSITIVE INTERACTION STYLE
- REINFORCING TO OTHERS
- GOOD LISTENER
- SHARE BELONGINGS AND FEELINGS
- SIMILIAR LIKES & DISLIKES
- TAKES THE PERSPECTIVE OF FRIEND
- SOMETIMES THE "BEST"
- TRUSTWORTHY AND LOYAL
- GETS THE MESSAGE ACROSS

DAY 2 OH

LANGUAGE OF US AND THEM

By Meyer Shevin

We like things	They fixate on objects
We try to make friends	They display attention-seeking behaviors
We take a break	They display off-task behaviors
We stand up for ourselves	They are non-compliant
We have hobbies	They self-stimulate
We choose our friends wisely	They display poor peer socialization
We persevere	They perseverate
We love people	They have a dependency on people
We go for a walk	They run away
We insist	They tantrum
We change our minds	They are disoriented and have a short attention span
We have talents	They have splinter skills
We are human	They are ???

YOU AND I

- I am a resident. *You reside.*
- I am admitted. *You move in.*
- I am aggressive. *You are assertive.*
- I have behavior problems. *You are rude.*
- I am noncompliant. *You don't like being told what to do.*
- When I ask you out for dinner, it is an outing.
  When you ask someone out, it is a date.
- I don't know how many people have read the progress notes people write about me. I don't even know what is in there.
  You didn't speak to your best friend for a month after they read your journal.
- I make mistakes during my check-writing program. Someday I might get a bank account.
  You forgot to record some withdrawals from your account. The bank called to remind you.
- I wanted to talk with the nice-looking person behind us at the grocery store. I was told that it was inappropriate to talk to strangers.
  You met your spouse in the produce department. They couldn't find the bean sprouts.
- I celebrated my birthday yesterday with five other residents and two staff members. I hope my family sends a card.
  Your family threw you a surprise party. Your brother couldn't make it from out of state. It sounded wonderful.
- My case manager sends a report every month to my guardian. It says everything I did wrong and some things I did right.
  You are still mad at your sister for calling your mom after you got that speeding ticket.
- I am on a special diet because I am 5 pounds over my ideal body weight.
  Your doctor gave up telling you.
- I am learning household skills. *You hate housework.*
- I am learning leisure skills. *Your shirt says you are a "couch potato."*
- After I do my budget program tonight, I might get to go to McDonald's if I have enough money.
  You were glad that the new French restaurant took your charge card.
- My case manager, psychologist, R.N., occupational therapist, nutritionist and house staff set goals for me for the next year.
  You haven't decided what you want out of life.
- Someday I will be discharged ... maybe.
  You will move onward and upward.

Elaine Popovich
Lutheran Social Services, Midland

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6055 Lehman Drive, Suite 101
Colorado Springs CO 80918

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For further resources on friendship-building strategies, contact the PEAK Integration Project, PEAK Parent Center, Inc., 6055 Lehman Drive, Suite 101, Colorado Springs, CO 80918 (719) 531-9400

11/30/89 PEAK Integration Project

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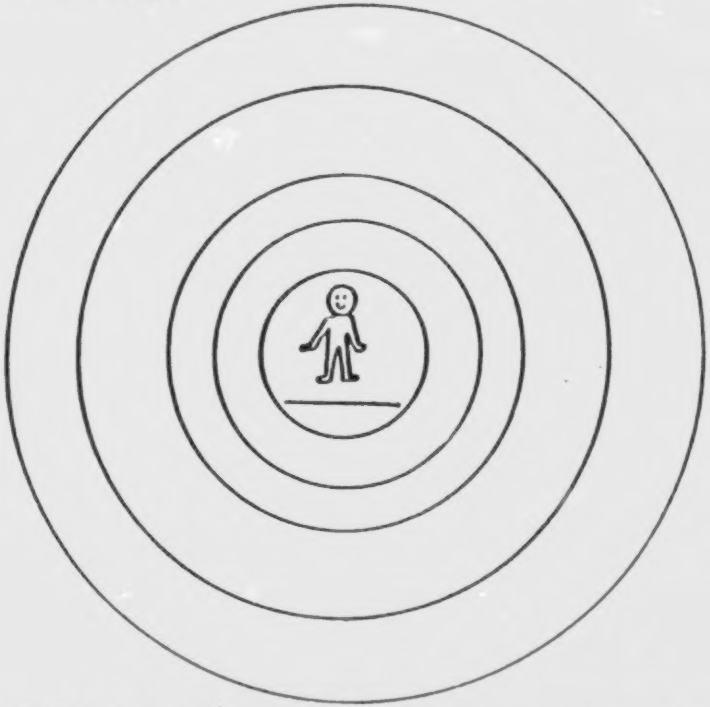
2b

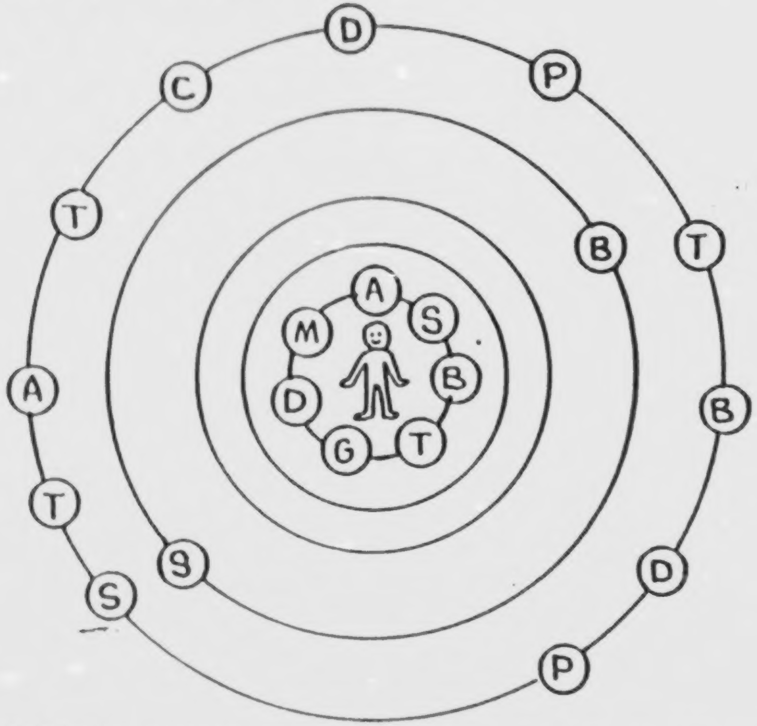
FILL IN
YOUR CIRCLES:

CIRCLE OF FRIENDS



• THE PERSON IN THE MIDDLE IS YOU. PRINT YOUR NAME ON THE LINE. ON THE CIRCLES PRINT THE INITIALS OF THE FOLLOWING PEOPLE:

INNER CIRCLE	Those closest to you - family and intimate friends.
SECOND CIRCLE	Good friends; people who you like and do things with regularly.
THIRD CIRCLE	People you know and do things with occasionally (bowling league; special interest club, etc.)
FOURTH CIRCLE	Just people you know, acquaintances
FIFTH CIRCLE	People whose job it is to be with you (teacher, aerobics instructor, doctor, etc.)



TYPICAL CIRCLE FOR A CHILD OR AN ADULT WHO HAS SIGNIFICANT DISABILITIES

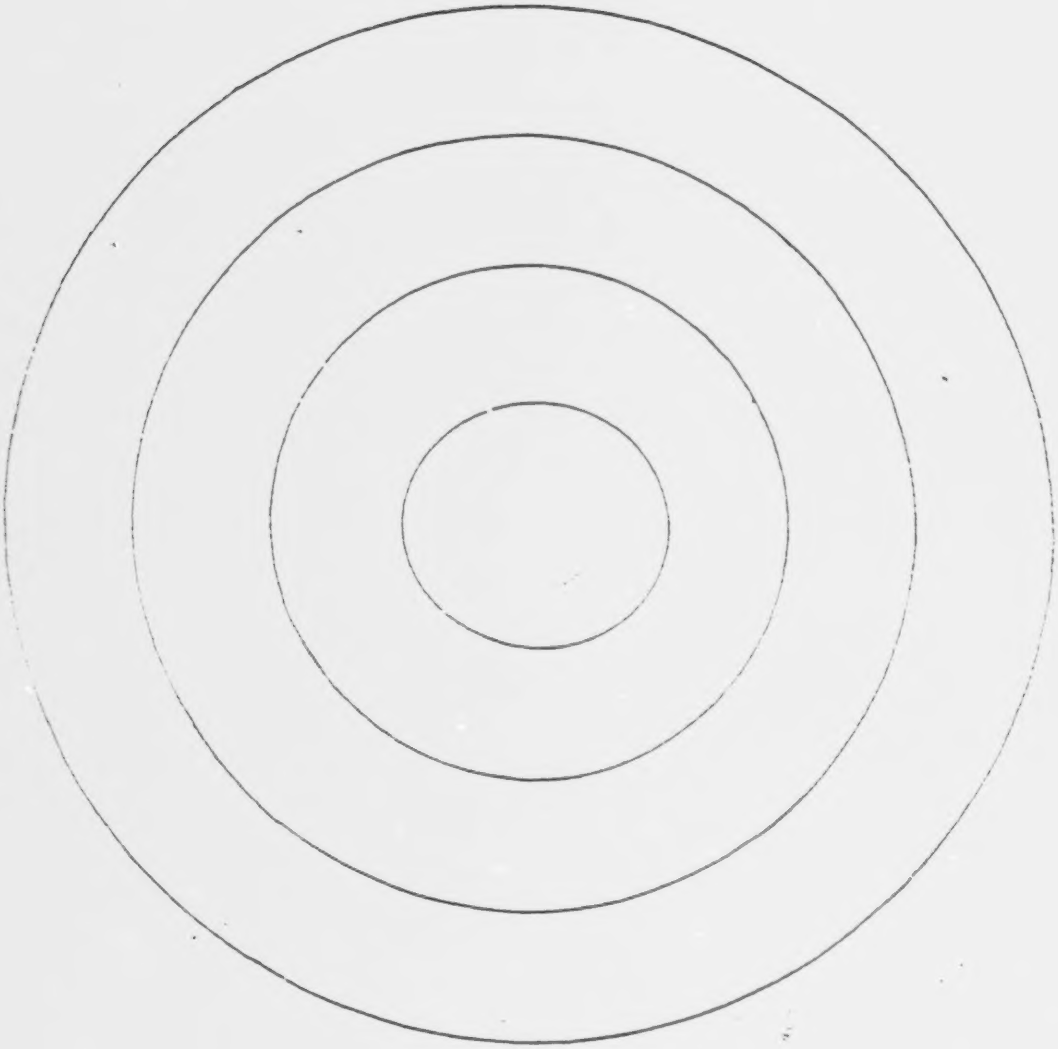
- MANY PEOPLE ON BOTH THE INSIDE AND OUTSIDE CIRCLES
- FEW PEOPLE ON THE CIRCLES IN BETWEEN

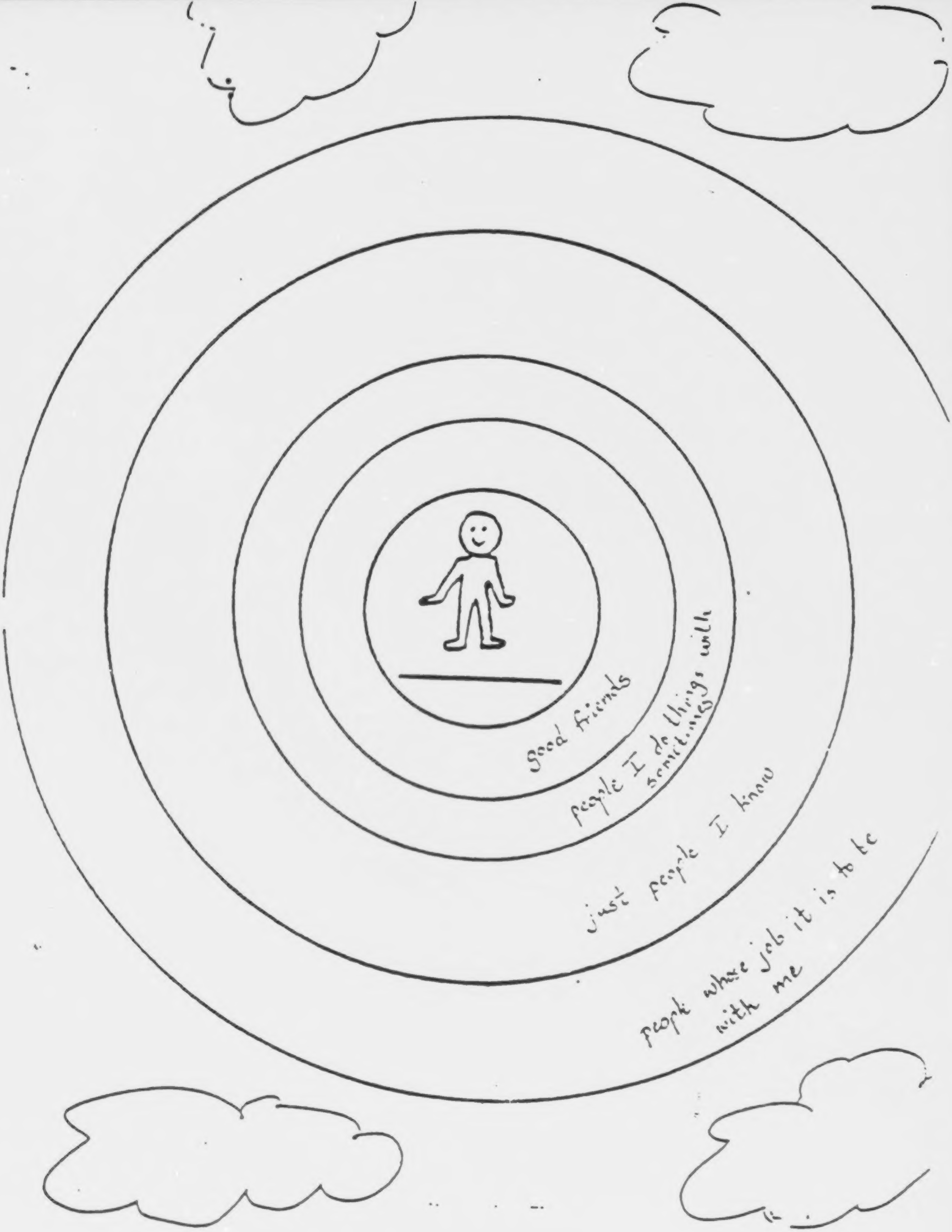
"WE HAVE ONLY BEGUN TO SENSE THE TRAGIC WOUNDS SOME PEOPLE WITH-HANDICAPS MAY FEEL WHEN IT DAWNS ON THEM THAT THE ONLY PEOPLE RELATING TO THEM — OUTSIDE OF RELATIVES — ARE PAID TO DO SO."

"LISTEN PLEASE"
JOURNAL OF MENTAL RETARDATION
APRIL, 1979, VOL. 29, NO. 2

TO FIND OUT MORE ABOUT HOW THIS ACTIVITY CAN BE USED TO FACILITATE THE DEVELOPMENT OF FRIENDSHIPS BETWEEN LABELLED AND NON-LABELLED CHILDREN IN SCHOOLS CONTACT: PEAK AT 531-9400 OR TOLL FREE 1-800-426-2466 x423 (CO. ONLY)

Circle of Friends




good friends
people I do things with sometimes
just people I know
people whose job it is to be with me

PEERS

PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

PROJECT DIRECTOR

Patrick Campbell, Asst. Superintendent/Dir
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3567
(916) 657-5086 FAX

REGIONAL OFFICES

Tom Neary
650 Howe Avenue
Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D
Ed. Psychology Dept.
CSU, Hayward
Hayward, CA 94542
(510) 881-3087 or
(415) 338-7849

Suzanne M. Gilbert
El Toro HS, Room 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8558
(714) 837-5066 FAX

Steve Johnson, Administrator
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3256
(916) 657-5086 FAX

TRIBES

"HUMAN BEHAVIOR IS THE PRODUCT OF THE INTERACTION BETWEEN THE GROWING ORGANISM AND ITS ENVIRONMENT"
K. LEWIN

TWO CURRICULUMS IN SCHOOLS

MANIFEST

LATENT

TYPICALLY OBSERVED IN CHILDREN

LOW SELF ESTEEM

ANTI-SOCIAL BEHAVIOR

DISRESPECT OF TEACHERS

LACK OF MOTIVATION

APATHY, DEPRESSION AND ALIENATION

SCHOOLS NEED TO PROMOTE POSITIVES:

POSITIVE PEER REGARD

COOPERATIVE LEARNING OPPORTUNITIES

POSITIVE CLASSROOM CLIMATE TO ENHANCE MOTIVATION AND IMPROVE BEHAVIOR

BASICS NEEDED IN TODAY'S WORLD

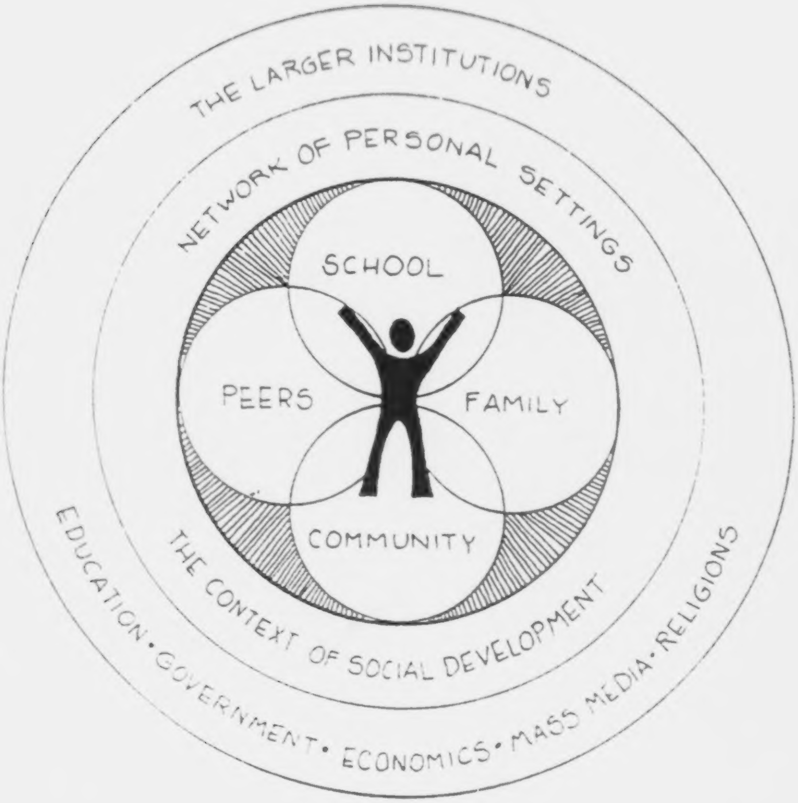
RELATEDNESS

RESPECT

RESPONSIBILITY

CHILDREN WHO DEVELOP PRO-SOCIAL SKILLS AND ATTITUDES FEEL BETTER ABOUT THEMSELVES AND OTHERS, AND HAVE A SENSE OF SELF-ESTEEM

CHILDREN VALUE THEMSELVES TO THE DEGREE THAT THEY HAVE BEEN VALUED.



THE LARGER INSTITUTIONS
NETWORK OF PERSONAL SETTINGS
SCHOOL
PEERS
FAMILY
COMMUNITY
THE CONTEXT OF SOCIAL DEVELOPMENT
EDUCATION • GOVERNMENT • ECONOMICS • MASS MEDIA • RELIGIONS

THE STAGES OF COGNITIVE AND SOCIAL DEVELOPMENT IN CHILDREN AND YOUTH

AGE/GRADE	KEY SYSTEMS	COGNITIVE DEVELOPMENT	SOCIAL DEVELOPMENT	PROGRAM IMPLICATIONS
2–4 Preschool	Family	**Preoperative Stage** ● magical thinking ● circularity ● difficulty dealing with more than 1 or 2 causes ● confuses physical-psychological causes of illness ● developing language skills	● emphasis on self ● oriented to parents ● needs limits, secure environment ● developing motor skills	● build self-esteem ● support social development (sharing, taking turns, asking questions) ● provide safe caring environment
5–7 Kindergarten to 1st Grade	Family School Neighborhood	**Preoperative Stage** ● magical thinking ● circularity ● difficulty dealing with more than 1 or 2 causes ● confuses physical-psychological causes of illness ● concrete mental operations	● emphasis on self ● identifies with own gender ● enjoys group play ● oriented to parents	● build self-esteem ● support social development ● involve parents in activities & knowledge social stages ● encourage sharing, caring behavior ● use cooperative learning groups
7–11 2nd to 5th Grade	Family School Neighborhood Peers	**Concrete Operations** ● begins to think relationally and to generalize ● becomes capable of integrating several variables in causal relationships	● oriented to parents ● enjoys group play & peer relationships same gender ● often competitive or has difficulties with peers ● often unaware of behavior affect on others ● impressed by older role models ● learns behavior from parent/peer role models ● more concerned about physical image than social ● may begin using drugs	● train parents & teachers in prevention ● use small groups (social skills) ● use cooperative learning groups ● provide feedback on behavior ● use curriculum on licit drugs & decision making ● provide non-drug using groups & activities

THE STAGES OF COGNITIVE AND SOCIAL DEVELOPMENT IN CHILDREN AND YOUTH
(continued)

AGE/GRADE	KEY SYSTEMS	COGNITIVE DEVELOPMENT	SOCIAL DEVELOPMENT	PROGRAM IMPLICATIONS
12–16 6th to 10th Grade	Family Peer Group School	**Normal mental operations** • capable cognitive problem solving • things abstractly & hypothetically • integrates multiple factors to understand concepts	• oriented to present rather than future • preoccupied with self presentation, acceptance by peer group, physical maturity • seeks initial sexual intimacy • seeks peer role models • motivated by social effects of drug use • seeks independence in decision making • differentiates between self and environment • feels awkward in social skills • experimenting and using drugs	• provide life skills curriculum & peer role models teaching refusal skills • use cooperative learning methods • encourage responsible decision making • promote peer leadership, peer counseling programs • involve in improving social environment • use role model peers to teach drug curriculum
16–18 11th to 12th Grade	Peer Group School Work Family Community	**Relatavistic thinking:** • capable of synthesizing wide range relational material	• primary concern individual identity, financial independence, deepening relationships, self-exploration, distancing from family & making own decisions • concerned more with psychological effects drugs than social or physical • oriented to peers	• empower leadership • involve in business ventures community projects and drug-free alternative activities • implement curricula focused on health, social economic and legal consequences of misuse alcohol and drugs

Peer Tutoring "Possibilities"

1. Students with severe disabilities are grouped together in a self-contained class on a general education site. The students have intense needs and require a high level of staff supervision. They stay in the classroom at all times except for brief recess periods taken while general education students are in their classes. This allows special education staff to closely supervise outdoor activity and to minimize chances of students with disabilities becoming injured. Lunch for students with disabilities is delivered to the classroom so the staff can assist students in improving their eating skills in a safe and protected environment. Recognizing the benefits of interaction between students with and without disability labels, the special education teacher has instituted a peer tutoring program. She has arranged for same-age peers to come in to the special education class once every week to work with students with disabilities on a variety of fine motor and gross motor activities.

2. Same-age peers have been recruited through a peer tutoring program to work weekly with students with severe disabilities on leisure skills. In some cases peers have been instructed to teach the students with disabilities how to play the game of Chinese Checkers. No particular structure or format was provided for this activity. Teachers simply verified that peers knew how to play the game and gave them the necessary materials and a place to work, in close proximity to the teacher who could be available in case of problems.

3. A peer has been involved in a cross age tutoring program for several months and has taken responsibility for tutoring two same-age students with disabilities. He tutors them in number skills (counting to ten). The peer is very serious about the project. Not only does he work on the skills in class but also when he encounters the students with disabilities on the playground or in the cafeteria he immediately seeks out opportunities to work on counting (counting ball bounces or counting silverware on the lunch tray . . .).

4. A school is going to have students with severe disabilities on the school site for the first time. The school has not had peer tutoring programs in place but recognizes that students with disabilities will "need a lot of help". School staff are planning a variety of ways that peers can help the "special ed" kids.

MAPS

1. History
2. Dreams/Vision
3. Nightmares/Fears
4. Who is......
5. Strengths/Gifts/Talents
6. Needs
7. Plan of action

Notes from Mike's Meeting

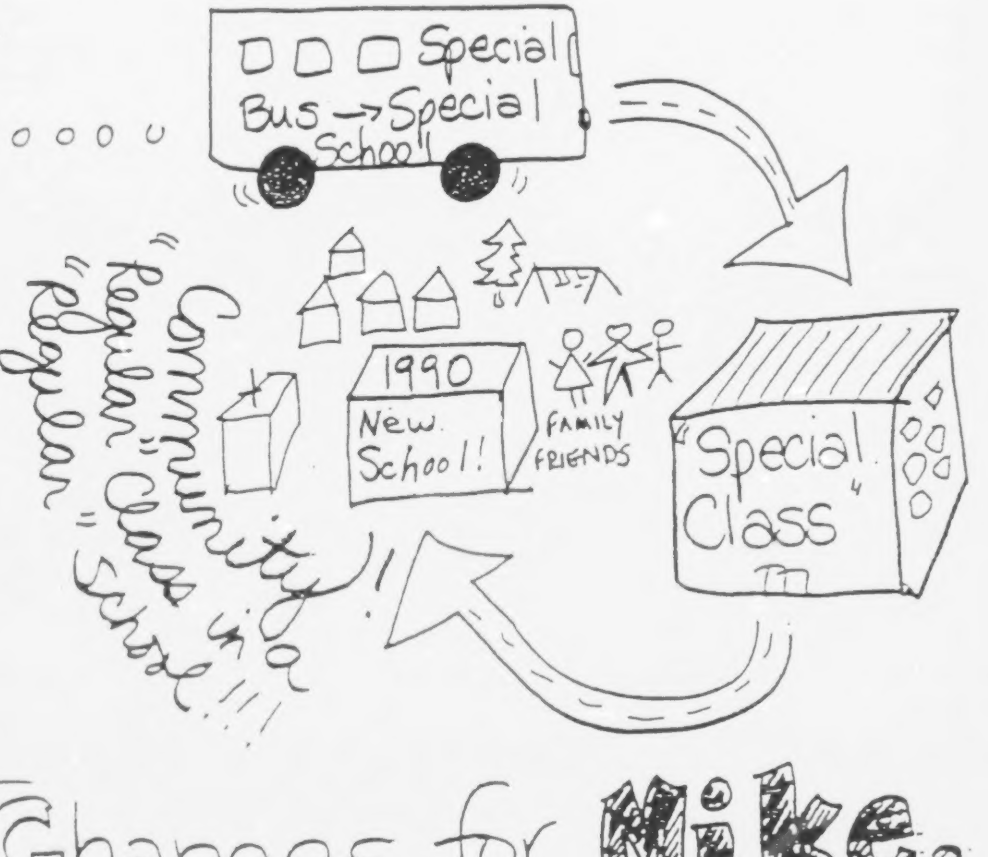
May 30, 1990

Content By: Mike's Friends, Parents, Teachers... with agreement fror Mike

Recorded By: Mary

Mike's Map...

his story...


Special Bus → Special School
1990
New School!
FAMILY FRIENDS
"Special Class"
Community "Regular" Class in a "Regular" School!!!

Changes for **Mike**, Changes since his arrival:

...people are nicer to each other; he knows how to "ignore" us now!; he can drop-kick a ball; he knows what he can do now; he makes it easier for people to be nicer to each other; he doesn't interrupt class anymore ...very much; we don't need to 'pick buddies' for Mike no. he can do it himself!; he has more friends, says whole sentences!

dreams we have for, and with, Mike!

... to grow up with his friends

... to learn how to read

... to have friends (lots)

... to have a job somedai
and make $ (

... to be a "regular guy"

... to have confidence
and be happy

... to travel thru schoo
and beyond!

... to go to college, be a
successful
businessman &
make lots of $!

... to have opportuniti
to help people,
teach people

Yes, we have even More Dreams

...to have a nice house,
get married and be
as independent as he can

...to be a professional
athlete (hun? baseball?

...to have lots of friends
who don't make a big
deal out of his differenc

...to not have to take his
medicine anymore

...to keep going thru schoo
with his friends

Nightmares

scary stuff we DON'T want to happen!

... friends who "drop" him
.... being forced to stay in Gr. 4 (when friends go to Gr. 5)
... people hurting Mike's feelings, leaving him out
... being alone, homeless
... bad teachers
... getting hit by a car
... people treating him "different"
... people rejecting Mike
... having to take medication forever
... forcing Mike to go back to his old school
... getting lost — people not understanding that he might need help
... becoming isolated
... riding motorcycles

Who Is Mike?

... likes people ... is smart ... likes purple ... is cool ... is fun ... friendly ... likes burritos ... likes kids ... has a loving heart ... funny ... cute ... likes to run ... enjoys movies and recess ... likes us and our class! ... confident ... is fun to make jokes with ... observant ... a guy who likes his Mom and Dad ... likes to smile ... caring ... talkative ... likes hugs ... fun ... loves the turtle and playing with his hands. loves all animals ... likes music and singing ... loves being "twirled around"! ... likes a school where they teach him good thin

Things Mike Needs:

- ☆ To be with his friends
- ☆ Teachers who love him
- ☆ Continue to go to his neighborhood school
- ☆ Make new/more friends
- ☆ Stay safe in the street
- ☆ Go to "regular" summer school
- ☆ The opportunity to make choices and help making them
- ☆ To learn new things
- ☆ "Someone exactly like Mrs. Cole"
- ☆ To feel comfortable, active, busy, included
- ☆ To continue learning how to express himself
- ☆ Continue learning how to walk safely
- ☆ Do what other kids are doing
- ☆ For people not to make fun of h
- ☆ The understanding/support of frie

Action Plan

1. Mike goes to grade 5!!
2. Hold an I.E.P. meeting to plan the "specifics"
3. Have a class meeting in September so Mike can meet all the new kids
4. Start planning for middle school (during next year).

Final Thoughts...

Mike has had an impact on this class... he's come a long way... it's different, better with Mike here... kids do it best!... Mike is going to make it because of all of "us"... we're thankful to be friends... people should look at people's "insides" first.

DANNY'S MAP

NOTE TAKING GUIDE

1. What is Danny's history?

2. What is your dream for Danny?

3. What is your nightmare?

4. Who is Danny?

5. What are Danny's strengths, gifts and abilities?

6. What are Danny's needs?

7. What would Danny's ideal day at school look like and what must be done to make it happen?

Roger, B. & Fellows, M. SAFAK. 1992

DANNY

According to his sisters...

Danny hangs around us all the time. We like to play Barbies and dress up and do stuff with our friends and Danny is always there. He needs some friends to do things with. He also needs to learn some sports. He is a nice brother and sometimes we have fun watching TV together. We try to help learn how to read and work on his counting but he likes to run around a lot. He bites his nails when he gets nervous. We think it is gross.

Mom isn't home very much, but when she is, she spends most of her time with Danny. Danny lets her do everything for him. We wish she could spend more time with us.

We have to do some things for him but he is pretty independent, except when Mom is around. He can dress himself and brush his teeth. Sometimes we have to tie his shoes or get the buttons going in the right hole if Mom has already left for work. We don't really mind. He has to be ready early because the special bus takes him to school. He could walk like we do if Mom wasn't so worried about him all the time.

DANNY

According to an interview with the mother...

Danny is the second of four children and the only boy. Danny's father has been absent from the home for seven years. Danny is happy and likes to play outside. He is a good eater. He likes to watch TV, stay up late and sleep in. He doesn't always follow directions the first time. He has been in a special day class since kindergarten.

Danny plays with his sister's and seems to enjoy their games, including dress up. He doesn't have friends outside of school and just a few at school. He has never been asked to come over to a friend's house to play. His mother would like him to have more age-appropriate and gender-appropriate activities.

She also would like him to be better at reading, writing and math. She knows he is behind in all academic areas but feels he could improve his skills in these areas if given a chance. She says he appears to be lazy sometimes but she feels he just needs more motivation. Danny has a good memory for current events he hears about on the TV. When he meets someone he remembers everything about them. He never forgets a name.

Danny's mother feels like she doesn't get to spend as much time with him as she would like since she is working two jobs. She worries about what will happen when his sisters get older and don't want to play with him.

DANNY

According to his Special Education Teacher...

Danny is happy at school. Sometimes he doesn't like to stay in the special education room and we find him roaming the school and watching the activities in the other classrooms. Danny is developmentally delayed and has been in a self-contained special day class like mine all his life. He gets along well with all the kids and is mainstreamed for music, which he enjoys.

His reading isn't on grade level but he sticks with the task, often biting his nails when he can't remember a word or some detail about a story we have read. He is doing well on the computer.

Danny is stubborn when he is doing a job he likes and it is time to do something else. If he hasn't finished, it is hard to get him to stop.

I think Danny would be a contributing member of a fourth grade class because he likes other kids and is curious about what they are learning. Next school year Danny will be in the general ed. class. I will be a resource for Danny and his teacher. We are all excited and nervous about this change.

DANNY

DAY 2 HO

According to his friends...

Danny is a new boy in our class this year. He was at our school before but we didn't know him or really spend time with him because he was in the special room. He doesn't always know what to say to us but now he is starting to just stand with us or follow us around.

We work on math, reading, spelling and stuff like that in Mrs. Hanson's class. Danny does too. We help him when he gets confused or can't find things. Sometimes he tries to help us. He has to work very hard to learn new things but he's smart.

He doesn't really know how to play the games we like at recess like dodge ball and kick ball but he can probably learn. He seems really happy when we play with him. He gets mad sometimes when he doesn't get his way and runs away. Sometimes he smells bad and wears funny clothes that don't match. Some kids make fun of him when he wanders around talking to himself and biting his nails. If you just go talk to him or ask him to play he stops. Sometimes Danny seems lonely or sad but when he is with us he laughs a lot and makes us laugh too. He can be very funny.

DANNY

DAY 2 HO

According to his fourth grade teacher...

Danny is a new student in my class. I am just getting to know him. This first couple of weeks he seemed somewhat bewildered by his new desk, classroom routines, activities and his gregarious classmates. He does appear to be happy and is starting to get to know some of his classmates.

Danny is willing to try any task we ask him to do and he is persistent in his work. This surprised me. I assumed he would need encouragement and assistance with all classroom activities. He doesn't. He is delayed in all academic areas and I'm not always sure if he is getting enough out of my lessons. His special education teacher seems to be happy with the progress he has made so far. I just don't know him well enough yet and have no special training. We are working together.

He is starting to contribute to class discussion if encouraged. Danny's classmates are curious about what he can and can't do. I think they want to help him but don't always know how.

He wanders around the classroom or just sits and bites his nails when he gets confused or doesn't understand the task. Danny gets upset when it is time to change activities. I'm just not sure what to do sometimes.

PEERS

PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

PROJECT DIRECTOR

Patrick Campbell, Asst. Superintendent/Dir
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3567
(916) 657-5086 FAX

REGIONAL OFFICES

Tom Neary
650 Howe Avenue
Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D
Ed. Psychology Dept.
CSU, Hayward
Hayward, CA 94542
(510) 881-3087 or
(415) 338-7849

Suzanne M. Gilbert
El Toro HS, Room 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8558
(714) 837-5066 FAX

Steve Johnson, Administrator
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3256
(916) 657-5086 FAX

SCHOOL SITE TEAMS
DAY 3

OBJECTIVES

Participants will:

1. identify strengths and pitfalls of instructional planning processes.
2. gain an awareness of the instructional planning team process.
3. acquire awareness of logistics of team planning.
4. gain strategies for analyzing general education schedules and lesson plans to determine where students' IEP objectives can be addressed within the general education classroom.
5. identify types of and processes for individualized curriculum adaptations for students.
6. generate strategies to identify and facilitate natural supports.
7. identify considerations in utilizing natural supports.
8. further develop team action plans.

AGENDA

		page number
8:30	Objectives/agenda	
8:40	Instructional planning process overview	42
8:50	Team Modeling skit for an instructional planning team meeting	43
9:30	Examples of current planning team practices	45
10:15	BREAK	
10:30	Curriculum adaptation strategies	46
11:00	Functional assessment	49
12:00	LUNCH	
1:00	Utilizing natural supports	56
1:30	Team Planning time	57

Note: This is an early release day.

Topic: Instructional Planning Process (95 min.)

8:40 AM
TRAINER'S NOTES

Today we will continue to focus on the team approach to inclusive education. With opportunities for understanding and practicing shared work, and with some shared beliefs, teams are highly effective support structures for full inclusion. Team effort is so important to successful full inclusion programs that we wanted to be sure and clarify the different types of teams that may be put in place. Toward that effort, we would like to draw clear distinction between the building level team and instructional planning teams.

Building level teams are formed at the site level. Usually, their purpose is to support full inclusion from a broad building perspective. The building level team might focus on issues that affect the site as a whole. What is the vision for all students? What is the school-wide commitment to full inclusion and how can it be broadened? What are appropriate class placements? How are initial daily schedules worked out? How can school-wide natural support be encouraged? What is the school approach to positive behavior change and how can more information on behavior change be accessed? How can planning time be created?

Membership on the building level team and the logistics of when, where, and how often the team meets depend on the purpose of the team and on the individual circumstances of the particular site. The building level team is what we concentrated on yesterday. It should have been the focus of much of your team planning time last night.

Today, the focus is more on the *instructional planning teams* that form in support of specific students. They are concerned more with individual students issues. How can materials and curriculum be adapted for a student? What are the procedures for data keeping and evaluation? How should the IEP be written? How can natural supports be facilitated in a specific classroom? How will circles of friends be formed and guided? How should positive behavior change be implemented in a specific situation?

MATERIALS

Overhead Projector

Overheads:
1. Building level Team (See day 2)
2. Instructional Planning Team

Handouts:
Copies of overheads

Topic: Instructional Planning Process

TRAINER'S NOTES (Con't.)

Instructional planning teams usually include as members those who are most directly involved in the day life of the student in the classroom. Logistics regarding meeting are worked out by the team members and may be much less formal than arrangements made by building level teams. However, many schools have recognized the priority for this planning time and have built it into teachers' days through a variety of mechanisms from block scheduling of electives for common planning time, to rotating substitutes.

As always, it is important to realize that the specific details of full inclusion support teams differ from site to site. Still, it is likely that more than one type of team will be needed. The purposes of each team must be clearly understood by everyone.

To get us started this morning, we'd like to demonstrate an instructional planning team meeting.

DIRECTIONS

Trainers assume different roles common to an instructional planning team, for example:

1. *the general education teacher who is new to having a student with severe disabilities in her class, doesn't really know why the student is with her and needs help, particularly in how to adapt classroom curriculum and activities*

2. *the special education teacher who arrives late for the meeting (and is known for this practice) and who takes phone calls during the meeting*

3. *the speech and language specialist who sees language as the most critical issue in each meeting*

4. *the physical therapist who is adamant about therapy time in a therapy room, to the exclusion of anything else if that's what it takes*

Table
Chairs arranged around it

Topic: Instructional Planning Process

DIRECTIONS Con't.)

This activity is meant to be entertaining and yet instructive for the group. Trainers should play their part grandly, so that the point is clear. Explain to the group that this skit is not meant to demean any particular person or even to suggest that special education teachers are always late and so on. Role play for approximately 5 minutes, with members leaving to take phone calls and even at one point leaving only the parent and the general education teacher in the room, members talking about unrelated things, professional dominance and language, no specific roles in the meeting, etc.

After the skit, have participants share their observations about what made the meeting the failure it was and how they would structure an effective meeting. Chart specific meeting "rules" with the group's input.

MATERIALS

Chart paper
Easel
Marking pens

Handout:
Pitts-Conway, V. 1991. Integration Planning Team Minutes. Santa Cruz Co. Office of Education.

Topic: Instructional Planning Team Process *(Continued)*

9:30 AM
DIRECTIONS

Trainers should share information from their own personal experience about how local planning teams are operating in incusive schools they're familiar with, particularly in regard to how they schedule time to meet and who covers classrooms when teachers are meeting. Spend a few minutes brainstorming with participants how they will operate and schedule team time. Chart ideas.

MATERIALS

Easel
Chart paper
Pens

TRAINER'S NOTES

The best practices in implementing good instructional planning teams for students have been described. We thought it would be helpful for you to hear how some California sites have implemented these concepts within their local resources.

In Colusa County, instructional planning teams involving all general and special education staff implementing inclusion meet monthly on a Friday between 11:30 and 2:30 P.M. The itinerant special education teacher chairs each meeting which runs for 20-30 minutes. The county office of education provides a substitute who takes each general education teacher's class while she is at the meeting. Money to cover this roving sub comes from staff development dollars. If anyone is unable to attend the meeting, someone is designated to inform them of discussion and decisions.

In San Diego Unified School District, planning team meetings are held before or after school. Members who attend are each general education teacher, the special education support teacher, and when possible, related services staff and paraprofessionals. Parents are invited and sometimes attend.

Lassen County holds individual planning team meetings once every 4-6 weeks. Initially (3 years ago) they were held weekly. Members include the integration facilitator, each general education teacher participating, parents and related services staff if necessary. The program is operated by the County Schools office, however, the school site hires the roving substitute for the day to release teachers.

MATERIALS

Topic: Curriculum Adaptation Strategies (30 minutes)

10:30 AM

TRAINER'S NOTES

Historically,adapting to allow for participation has been a staple in special education. Adaptations in materials used, assistance provided, rules, activity sequences, as well as physical changes to the environment have enabled persons with impairments in cognitive, motor and language function to participate in many aspects of school and community life. Viewing these adaptations beyond the scope of special education or outside the realm of persons with disabilities only, has enabled service providers to expand their thinking about the many ways things can be accomplished. We all use adaptations in our lives, from the calculator we use to balance our checkbooks to our daytimers to keep track of our busy schedules and to compensate for our memory problems. As Owen White pointed out in "Adaptive Performance Objectives: Form Versus Function" (Sailor, Wilcox & Brown, 1980) what is important is the critical effect of a response, not the form of the response. One of our responsibilities as educators is to identify the critical effects or outcomes we want for our educational programs and then find ways for students with a wide range of abilities and interests to achieve those outcomes. Special education was originally conceived to allow for that individualization, not as an alternate place to learn an alternate curriculum. Adaptations support individuals in participating by providing the tools they need.

Overhead:
Curriculum Adaptation
Strategies

Five basic ways to organize core curriculum appear to have emerged in integrated settings. These are by no means the only ways to adapt curriculum, but offer a way to prompt thought. The first choice of course, is to examine the opportunities for participation with no changes at all. Many of the activities and routines in general education classrooms do not require any adaptation since they accommodate participation at a variety of levels as a matter of course.

DIRECTIONS

Share a variety of curriculum adaptations here through slides. Describe the adaptation as a member of each particular category, but note that they often overlap. Ask the group for other examples. The purpose of this section is to show that adaptations are usually a combination of common sense and creativity and that one need not be in special education to have either of these qualities.

Topic: Curriculum Adaptation Strategies *(Continued)*

TRAINER'S NOTES

1. **As is. Students are involved in the same lesson as other students with the same objectives and using the same materials.**
    - Matt works at the reading station with other students, listening to a tape of a book while following along in the book with others.
    - Amy shares a favorite toy with her class during morning circle by showing it to her classmates and answering questions about it.
    - Lorena takes snapshots on campus to help construct the candid photo pages for the school yearbook.
2. **Providing physical assistance. Assisting a student to complete activities by the actual manipulation of materials, equipment or his/her body.**
    - Christian's friend, who sits in front of him, turns the pages of his book when he finishes a page and asks for help.
    - Anna's friends assist her out to recess because she has trouble on uneven terrain.
    - Sean's peer assistant reads his in-class, one page science assignment to him so that he can participate in the science experiment and discussion.
3. **Adapting materials. Utilizing materials that allow for participation in age-appropriate activities without having pre-requisite basic motor, communicative or cognitive skills.**
    - Christian uses pens that are larger and heavier than typical pencils allowing for more sensory input and compensating for fine motor deficits.
    - Amy uses a calculator during "Mad Minute" math to allow her to compete.
    - Jon uses a name stamp to sign his work. The stamp has been handwritten by a same-age peer, making his signature similar to those of his friends.

MATERIALS

Slide projector
Screen
Slides showing
Curriculum adaptation

INCLUSIVE EDUCATION

MATERIALS

Topic: Curriculum Adaptation Strategies *(Continued)*

4. **Multi-level curriculum. Students are working in the same subject area, but are working at different levels of curriculum.** ***(Note that most adaptations will be in this category)***

- Jon works on 3 spelling words instead of the 10 per week his peers are responsible for.
- Brian organizes pictures instead of printed words into categories in the animal habitat lesson.
- Neil dictates his journal comments to his support staff or peer who prints them lightly in his journal for him to trace over.

5. **Curriculum overlapping. Students are involved in the same activity with other students but may have a goal from a different curriculum area.**

- Anna works on her ambulation skills as she moves to her learning centers.
- Sam is responsible for locating his classroom, finding his chair and taking out his class materials during basic science class.
- Joan works on her ability to make choices during silent reading time by requesting that a book be read to her and letting her partner know when to turn the page.

6. **Substitute curriculum. Students are involved in alternative activities that meet primary instructional needs when the general education curriculum at that time does not.** ***(Note the importance of participation with other students in the class in these activities. Also, stress that this is a team decision, not one individual's).***

- Aaron collects attendance during the morning math lesson.
- Stacey works on her computer with reading games while her peers are taking the chapter test in science.
- Todd participates at an off-campus worksite in the afternoon to meet a critical IEP objective. (This might occur in conjunction with vocational training offered to general education students rather than being a special education activity).

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MATERIALS

Topic: Functional Assessment (60 minutes)

11:00 AM
TRAINER'S NOTES

Curriculum Matrices

Teachers in general education who have not had experience in providing instruction for students labeled severely disabled often believe that they do not have the skills to work with these students, or that the general education environment does not offer what a particular student needs. Special education has reinforced these beliefs over the years by establishing separate but ostensibly equal learning environments and welcoming students with special needs with open arms. It has become obvious to many educators, however, that special environments cannot offer the variety, stimulation or potential that general education environments can, - particularly because variety, stimulation and new ideas come also from the thirty or so students in those environments. Communication regarding individual student needs and the general education core curriculum and routine clarifies the potential of the regular classroom.

Many educators in inclusive schools utilize a matrixing process for initial communication. This involves a discussion of current Individualized Educational Program goals and objectives in the context of the classroom schedule. This informal meeting between the classroom teacher and the special education teacher or consultant provides time to clarify the desired outcomes for a particular student in cognitive, language, motor, social or self help skills; to ensure that the classroom teacher understands the expectations regarding achievement of core curriculum objectives and to gain insight from the classroom teacher about opportunities in classroom routine. An additional and equally important objective of this meeting is to acknowledge the classroom teacher's ability to generate ideas about how to meet student objectives. This is particularly important to encourage not only because the special education support person(s) will not always be available, but because the creative ideas of non-special educators need to be unleashed.

Current objectives from the most recent IEP are listed in the left column of the curriculum matrix. The classroom schedule is listed across the top. Each IEP objective is examined across each classroom activity listed to identify potential for being addressed in that activity/routine and to brainstorm creative ways to work on that objective at that time. It has become evident that acquisition of basic motor, cognitive, social and communicative skills is more easily accomplished when they are infused or imbedded within relevant, natural contexts. (Sailor, Goetz, Anderson, Hunt & Gee. 1988; York & Vandercook, 1991 here). For

Overhead projector
Screen

Overhead - matrices
Anna
Dylan
Stacey
Neil

430

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MATERIALS

Topic: Functional Assessment *(Continued)*

example, *Anna* needs to work on her mobility. Each movement to a new group or classroom environment provides the opportunity to practice this skill. *Dylan's* IEP specifies writing his name. He'll practice this during each paper and pencil task in his classroom, including journal writing and art projects. It's important that *Stacey* develop a sight word vocabulary and in examining her classroom schedule, three specific times were identified, during her morning handwriting time at 8:30, during the reading/language arts period at 10:00 and again during silent reading at 12:20. *Neil's* IEP specifies his use of visual and auditory cues. He'll work on these skills throughout the day and staff will be attuned to this need in the manner in which they provide instruction. This initial brainstorming is meant to generate ideas, not to fix curriculum. More information through the functional assessment process and through discussions in planning team meetings will further define which words *Stacey* will work on, how she'll practice these skills and what support she'll need. It's interesting to note that teachers involved in inclusive programs report that objectives change once students become more involved in their general education classrooms. Other skills become important to their success and educators are able to see motivating events, routines and information that make more sense programmatically and with an eye on changes in quality of life issues.

IEP objectives that for one reason or another cannot be met through the typical classroom routine are noted. These may be addressed through a substitute activity or can be discussed again through the IEP and team planning process to determine whether they are still important.

The major purpose of this first discussion of curriculum is threefold: to gain an insight into the classroom routine, to ensure that individual needs are going to be systematically addressed and to encourage collaborative ideas from both general and special education teachers. This last purpose is critical in facilitating ownership of student success.

DIRECTIONS

Ask for questions/comments re: the matrixing procedure. Note the importance of establishing planning teams to continue this process. If teams have brought information to complete a matrix for one of their students, have them utilize this tool to plan for their student, then share with the group.

Blank matrices

MATERIALS

Topic: Functional Assessment *(Continued)*

TRAINER'S NOTES

Functional assessment
Assessment is not a static, once a year event, but rather a dynamic process that continues to generate new questions and new information. Our skills as educators improve with our increasing understanding of our students. Learning is also dynamic and exponential. As we learn new skills, the application of those skills opens up an ever expanding world, creating new challenges and new motivation. Each parent and educator we've talked with has expressed their surprise and delight at the way students in inclusive settings have exceeded expectations. This understanding validates the need to view assessment as an ongoing process that is intertwined with instruction. As we teach, we learn. The ecological, task analytic assessment strategies developed in special education over the years offer a method for examining classroom activities and routines and for generating a wide range of useful information. Viewing skills in context is also recognized as sound educational practice in general education as evidenced by whole language, thematic or unit based instruction. In fact, asking anyone what they remember most fondly from their own educational experience will likely result in describing some form of experiential learning. There is an increasing interest in activity based instruction in general education in contrast to dydactic methods and the use of "authentic", performance based and portfolio assessment strategies in conjunction with those innovative methods.. The application of real life experience as a basis for education has been a major force in education for students with severe disabilities for the past fifteen years and is one of the benefits of moving special educational services into the general education classroom. Community based instruction is valuable for all students. A number of educators are finding ways to involve students in general education in functional, community based instruction. (Ford & Davern, 1989, 1992; Falvey, Coots, Bishop & Scheyer, 1989)

Assessment provides educators with information primarily about two things: what to teach and how to teach. Our assessment process should be providing us with information about how this student currently performs in an activity, how they use information, what modality is preferred or most useful to them, where in the activity or routine we need to facilitate learning, how we can adapt to allow participation and where we should focus our instructional resources, among other things. Assessment should make us excited about teaching this student because it should generate keys to learning for the individual student. PEERS' Classroom Activity Assessment Worksheet organizes information gathered into five areas:

Overhead:
Blank classroom activity analysis worksheet

INCLUSIVE EDUCATION

MATERIALS

Topic: Functional Assessment *(Continued)*

1. Classroom activity steps: a listing of generic activity or routine steps that any student takes in performing this activity. These should be discrete and small enough to allow a description of student performance on specific parts of the activity, but not so small as to make them counterproductive.

2. Student performance: a description of what the student did at this point in the activity or routine describing whether or not the student responded to the natural cues, their physical performance on the step, any specific assistance that was necessary to support the student and any additional information that will help the team to determine how best to support the student in this activity.

3. Specific adaptations: ideas for how this activity step may be adapted to allow participation, for example, adapted materials, rule changes, providing physical assistance, focus on a different level of skill or changes in the environment.

4. Skills in need of instruction: ideas about skills in this activity that the student should work on to increase their competence and independence, such as development of communication, motor or cognitive skills. Ideas about how these skills might best be taught are also helpful to the team.

5. Comments/recommendations: additional information that might be helpful to a planning team is included here. This is the catch-all section of the tool and contains ideas for providing support, things to discuss with parents or others and suggestions for the team about how to ensure the student's success in the activity.

Functional assessment information is always gathered in natural settings, with natural cues and consequences available. The assessor's role is to observe how the student uses those natural cues and corrections, their physical performance of activity skills and how they may self correct. Information, in the form of prompts or corrections is provided only when the student is unable to move on in the activity and then only at the least intrusive level of prompt necessary. Our assessment process should not overlook natural support for individual performance. For example, do other students receive assistance from each other throughout the day? Does this natural assistance hinder a particular student from learning? The assessment worksheet notes Anna's performance in a first grade circle time. Her participation in the activity includes raising her hand when her name is called in attendance. Peers who helped her appeared to assist too early, not allowing her the chance to

Overhead:
Anna's assessment for morning circle time

456

485

INCLUSIVE EDUCATION

Topic: Functional Assessment *(Continued)*

do this independently. She was also pulled to a standing position. In examining her IEP objectives, getting up from the floor independently is a targeted objective. Observing in a functional context makes these discrepancies clear to us and allows for the discussion of strategies for Anna's skill development in this area.

In another example, Bob, who is enrolled in Personal Word Processing class, has a problem recognizing which file belongs to him as he obtains his materials for the day. He also has difficulty interacting successfully with others in the class. Teaching Bob to ask for assistance from peers or the teacher when he needs help can become a targeted goal for him in this class. Strategies to support his recognition of his own materials appear to be critical.

It might be helpful for you to view a student in an inclusive setting and see how you might analyze his performance in a classroom activity. We'll show a video tape of Dylan involved in an activity in which students are asked to recall things they did during the month of March. They'll brainstorm as a large group while the teacher lists the activities they generate on the board. Each student will then write the list in his or her journal. Next they'll trace around a template and cut out a paper shape to paste in the journal and decorate.

Watch Dylan's involvement using the Classroom Activity Analysis worksheet you have and make notes as you watch regarding his present performance, ideas for adaptations and areas to teach. We'll discuss what you have generated afterwards.

DIRECTIONS

Use video tape showing a student involved in a classroom routine. Trainers should use a student they're familiar with. Following the video, ask for participants' assessment data, taking each area of the assessment worksheet one at a time.
After discussing their ideas for adaptations, teaching and other recommendations on the student's participation, ask for any questions or concerns about this process. Typically, participants have concerns about who will do this and when it will be done. This should be addressed as a large group because it is important that this level of assessment be done. It should be addressed also as part of team planning. The transdisciplinary team approach is critical here and should be stressed.

MATERIALS

Overhead::
Bob's assessment for word processing

VCR
Video of student in gen. ed. activity
Blank worksheet with steps listed on O.H.
:

Handout:
Curriculum adaptation package

Topic: Functional Assessment *(Continued)*

TRAINER'S NOTES

Related service providers, for example speech and language therapists, physical and occupational therapists, adapted P.E. specialists and psychologists have traditionally pulled students to separate environments to assess them in particular discipline areas.
The validity of this practice, at least for much of the information derived is in question. Because a student performs certain language, motor or cognitive skills in a separate setting or is not performing them in that setting does not always translate to the real, criterion environment. Information about these basic language, motor, cognitive and social skills is best attained in natural environments and activities. As students are being assessed in typical classroom activities and routines, related service providers should also be gathering relevant information at the same time. This transdisciplinary team approach serves to generate concrete strategies for improving performance in day to day, relevant routines. For example, if Anna is having trouble getting up and down, a physical therapist needs to provide expertise at this point in this activity. What is the best way for her to go from standing to sitting on the floor? Should she move to her knees first? Similarly, a speech and language specialist should be involved in observing her during circle and creating her communication system for morning circle sharing.

Overhead:
Comparison of
multidisciplinary,
interdisciplinary, and
transdisciplinary,
team functions

The Classroom Activity Analysis worksheet is one format for generating useful information to organize instruction. It is meant to make us aware of the student's present performance and as a decision worksheet to identify where and how we might adapt, where and how we might focus our instruction and where and how to support the student in this activity. Information and recommendations are then brought to the team planning meetings for discussion.

It is a common complaint that the paperwork portion of a functional assessment can be overwhelming or unwieldy, considering the number of activities a student is involved in, the day to day changes in routine, and the staff intensive nature of functional assessment. The critical factor is this type of assessment is that each support person involved in the program should be competent to gather information in this fashion on an ongoing basis. If these worksheets are unwieldy, less intrusive means can be used. However, the functional assessment process is critical to meeting individual needs and is the difference in many cases between individualized instruction and just "being there".

Topic: Functional Assessment *(Continued)*

Critical Skills Summary
Periodically, new support people become involved in inclusive programs. Communicating the targeted objectives of students is important so that continuity in programs exists and so that as new activities emerge in the classroom, instructional personnel are able to stay focused on student needs. It is also helpful to communicate to others who wonder just what student needs are being met in this setting. The following Critical Skills Summary worksheet outlines those important objectives for a student across the school day.

12:00
LUNCH

MATERIALS

Overhead:
Critical skills summary

MATERIALS

Topic: Utilizing Natural Supports (30 min.)

1:00 PM
TRAINER'S NOTES

An important part of making full inclusion work is taking advantage of *natural supports* that exist in any situation. We all depend on natural suports in our environment. We ask friends for help and advice. We feel free to question those around us who might help us through our daily lives. There are a lot of natural supports in a school. We need to help students with disabilities access those supports and we need to help students without disabilities offer those supports.

Natural supports typically present in the general education classroom are the teacher and all the students. We are beginning to realize that the teacher is almost more of a manager of resources than a traditional teacher. The teacher facilitates and models learning in the classroom and as part of this process, the teacher allows students to help each other to learn. Students become facilitators and supporters themselves. They can do a lot to help a student with a disability learn how to get along in the general education classroom. No one knows better what the "rules" are in any classroom situation. They are the ideal natural supports in helping a student with a disability fit into the general education classroom world. If we teach general education students to recognize the varying levels of need of particular students, and if we encourage them to support each other to meet those needs, we are taking full advantage of the natural supports available to help make inclusion work.

There are some things that can be done to see that natural supports are in fact working in a classroom. Provide for proximity (natural support will not develop if students are not together). Use cooperative learning techniques. Allow students to share. Create buddy systems. Set up tutoring programs. Encourage and facilitate circles of friends or TRIBES or use the MAPS process. Let natural, informal friendships develop. Teach peer support and friendship skills. Be a positive support and friendship model for students. Let students handle challenges independently, then watch them and learn from them. All of these strategies will help keep natural support active.

As with any other technique, the use of natural supports might raise some issues that must be addressed.

Neary, Halvorsen, Gilbert & Terry-Gage, PEERS, 1992.

INCLUSIVE EDUCATION

MATERIALS

Topic: Utilizing Natural Supports (Con't.)

DIRECTIONS

Begin a group discussion of issues around natural supports and ask for possible strategies to deal with each issue. Some of the issues that the group might raise are: privacy and dignity of all students; hygiene; comfort level of all involved; students "tattling" ; how to give correction; doing things with rather than for others; using peers as "little teachers" . Note for the group that one good guideline for problem solving is that what we do when students with disabilities are involved is not really different from what we do when non-disabled students are involved. What is good for some kids is usually good for all kids. Sometimes using natural friend to friend behavior is the most appropriate response.

Chart paper
Easel
Marking pens

Topic: Team Planning (30 min.)

1:30
DIRECTIONS

Provide the next 30 minutes for teams to meet to update their action plans. Critical topics to address in their plans at this time are:

1. *how they will establish instructional planning team meetings.*
2. *decisions about responsibilities for functional assessments and*
3. *ways to utilize natural supports at the school site.*

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INSTRUCTIONAL PLANNING TEAMS

Purpose: Supports implementation of full inclusion at the student/classroom level.

Issues:
Adapting curriculum and materials:
Data keeping and evaluation:
Writing the IEP:
Facilitating natural supports:
Guiding circles of friends:
Implementing positive behavior change:

Membership:
Parent, as needed
General education teacher
Special education teacher
Designated instructional personnel, as needed
Student, when appropriate

Size: 2-4

Meetings: Weekly or more

Integration Planning Team Meeting
Minutes

School: ____________________

Students: ____________________

Teacher(s): ____________________

Date: ____________________

TEAM MEMBERS PRESENT:

TEAM MEMBERS ABSENT:

____________________ ____________________

____________________ ____________________

GROUP ROLES ASSIGNED:

Facilitator: ____________ Time Keeper: ____________

Recorder: ____________

TODAY'S AGENDA ITEMS:

1) ____________ 6) ____________
2) ____________ 7) ____________
3) ____________ 8) ____________
4) ____________ 9) ____________
5) ____________ 10) ____________

ACTIONS:	PERSONS RESPONSIBLE:	TIMELINE:
1.		
2.		
3.		
4.		
5.		
6.		

AGENDA ITEMS FOR NEXT MEETING:

1.

2.

3.

4.

5.

6.

DATE, TIME, PLACE OF NEXT MEETING:

Team Minutes – December 12, 1990

ACADEMIC		SOCIAL/BEHAVIOR	
Successes	Challenges	Successes	Challenges
– Patterning/free exploration stage – Stringing beads – Language: sings appropriately, rhymes, repeats words and phrases. Understands well – Transitioning improved – Anticipates next activity – More independent – No "taste for paste." – Following directions	– Patterns needs assistance – Pencil grasp – Cutting/following pattern – Writing more legibly – Listening in a group – Dictation: Describing pictures – More eye contact – Articulation: /d/ phoneme – Stimulus activities for walking	– Comes in independently from recess – Picking partners – Using visual cues – Bonded in class – Reduced amount of inappropriate "noises" – Responds appropriately	– Not enough time to choose – Lessen noise making – Other students are imitating noises – Eating lunch more quickly – Initiating contacts with children – Making friends

Necessary aide time: First half of class time would be the more difficult. Second half easier during activity time.

Focus December/January: Start reducing aide time. Maintain a chart showing which times of the day to be most appropriate for ____________________ to be working without an aide.

Next Meeting: January 23, 1991. Time: 12:45 p.m. Room: 28-P

DAY 3 HO

AS IS

STUDENTS ARE INVOLVED IN
THE SAME LESSON AS OTHER
STUDENTS WITH THE
SAME OBJECTIVES AND USING
THE SAME MATERIALS.

PROVIDING PHYSICAL ASSISTANCE

ASSISTING A STUDENT TO COMPLETE ACTIVITIES BY THE ACTUAL MANIPULATION OF MATERIALS, EQUIPMENT OR HIS BODY.

ADAPTING MATERIALS

UTILIZING MATERIALS THAT ALLOW FOR PARTICIPATION IN AGE-APPROPRIATE ACTIVITIES WITHOUT HAVING PREREQUISITE BASIC MOTOR, COMMUNICATIVE OR COGNITIVE SKILLS.

MULTI-LEVEL CURRICULUM

STUDENTS ARE WORKING IN THE SAME SUBJECT AREA, BUT WORKING AT DIFFERENT LEVELS OF CURRICULUM.

CURRICULUM OVERLAPPING

STUDENTS ARE INVOLVED
IN THE SAME ACTIVITY
WITH OTHER STUDENTS
BUT MAY HAVE A GOAL
FROM A DIFFERENT
CURRICULUM AREA.

SUBSTITUTE CURRICULUM

INVOLVEMENT IN ALTERNATIVE ACTIVITIES THAT MEET PRIMARY INSTRUCTIONAL NEEDS WHEN THE REGULAR CURRICULUM AT THAT TIME DOES NOT.

PEERS

IEP Obj./Classroom Schedule Matrix

✓ = Opportunity to work on student's IEP objectives

Anna

First Grade 1990-91

Classroom Schedule

IEP Obj.	8:30-8:50 Opening: Flag; attend.; calendar.	8:50-9:45 Lang.; Reading; Phonics; Choice.	9:45-10:00 Recess; snack	10:00-10:15 Sharing	10:15-10:50 Math; manipulatives; Sorting; Classifying	10:50-11:30 Music; PE; Social studies	11:30-12:15 Lunch	12:15-12:35 Story	12:35-1:20 Lang.; Journal; Math; Brainstorming; Choice	1:20-1:30 Recess	1:30-2:15 Art; PE; Social studies
Walk independently	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Clap hands			✓		✓	✓				✓	✓
Part. w/peers in PE games			✓			✓	✓			✓	✓
Use name stamp independently		✓			✓	✓			✓		✓
Use crayon or paint approp.		✓			✓	✓			✓		✓
Complete 3 piece puzzle		✓			✓	✓			✓		✓
Follow multi-step routine	✓	✓	✓			✓	✓			✓	
Get in and out of wheelchair	✓		✓				✓			✓	✓
Up and down from floor indep.	✓	✓		✓	✓			✓	✓		
Use 5 new signs to communicate	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Say "Mom" to photo or mother	✓	✓			✓	✓			✓		✓
Choice using commun. board		✓	✓		✓	✓			✓	✓	
Turn taking with peer		✓	✓		✓	✓			✓	✓	✓
Circle of friends; initiate interaction		✓	✓		✓		✓		✓	✓	✓
Computer use-games;commun.		✓			✓				✓		✓

PEERS

IEP OBJ./CLASSROOM SCHEDULE MATRIX

✓ = Opportunity to work on student's IEP objectives

Classroom Schedule

Dylan IEP Obj.	8:35 Opening circle: calendar, song, surprise box, jobs	8:50 science/soc. studies; oral language	9:10 Journal writing	9:40 Recess	9:55 Story time on rug	10:15 Groups: Math, Science/ Soc.studes, P.E./art,Lang. arts/reading	12:00 Lunch	12:45 Silent Reading	1:00 Sharing, music, social studies, library, chorus	1:45 Recess	1:55 Math, problem solving, free choice, reading
Id letters of the alphabet		✓	✓			✓		✓	✓		✓
Id 5 sight words	✓	✓	✓			✓		✓	✓		✓
Count 5 items	✓	✓				✓			✓		✓
3 part patterning	✓	✓	✓			✓			✓		✓
Classification skills		✓			✓	✓			✓		
Uses computer											✓
Cuts shapes			✓			✓					
Writes name		✓	✓			✓			✓		✓
Increase verbal skills	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Raise hand for attention	✓	✓	✓		✓	✓		✓	✓		✓
Line up with class				✓			✓		✓	✓	✓
Independent toileting							✓			✓	
Refrain from taking other's things		✓	✓			✓		✓	✓		✓
Increase receptive skills	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
Build vocabulary	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

DAY 3 HO

PEERS

IEP Obj./Classroom Schedule Matrix

✓ = Opportunity to work on student's IEP objectives

Neil

Classroom Schedule

IEP Obj.	8:30-8:40-Opening; Roll; lunch count.	8:40-9:05 Journal	9:05-9:40 Math stations	10:00-10:20 Whole group	10:20-11:15 Reading stations	11:15-12:00 Lunch	12:00-12:25 Spelling	12:25-12:50 Story/DEAR	1:00-1:50 Science OR	Plan/Do review	2:00-2:35; Drama; PE; Music; speech
Trace name; assignments		✓	✓		✓		✓		✓		
Dictates a comp. thought		✓		✓	✓				✓	✓	
ID character in story		✓		✓	✓			✓			✓
ID colors	✓		✓		✓			✓	✓	✓	
Read sight words		✓			✓		✓	✓			
Attend to visual cues	✓	✓	✓	✓	✓			✓	✓	✓	✓
Attend to auditory cues	✓	✓	✓	✓	✓			✓	✓	✓	✓
Follow 1 step direction	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Remain on task in group	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
Follow class rules	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
1:1 corresp. #'s 1-10			✓						✓		
Rote count 1-10	✓		✓								
Count sets of #'s to 10	✓		✓		✓						
Trace numbers			✓								
Recite days of the week	✓										

PEERS

IEP OBJ./CLASSROOM SCHEDULE MATRIX

✓ = Opportunity to work on student's IEP objectives

Stacey

Classroom Schedule

IEP Obj.	8:30-8:45- Roll; Handwriting	8:45-9:20 Math terminals	9:20-10:00 Recess	10:00-11:15 Reading; lang. arts	11:15-12:00 Lunch	12:00-12:20 Silent reading	12:20-12:50 Social sciences	12:50-1:00 Recess	1:00-1:50 Health	1:50-2:00 Recess	2:00-2:35 Music; PE or film
Join activity w/ other student		✓	✓	✓	✓		✓	✓	✓	✓	✓
Remain on task	✓	✓		✓		✓	✓		✓		✓
Begin task w/in 5 sec.	✓	✓		✓		✓	✓		✓		✓
Single digit addition		✓									
Rote count to 50		✓									
ID numbers to 50		✓									
Write dictated numbers to 50		✓									
ID coins		✓									
Read sight words	✓			✓		✓					
ID beginning consonants	✓			✓		✓					
ID character/ setting of story				✓		✓	✓		✓		
Dictate a sentence	✓			✓			✓		✓		
Write lower case letters	✓	✓		✓			✓		✓		

Integration Matrix* – High School

(Harbor High, Santa Cruz; Debbie Zehnder, Teacher)

		Period 1	Period 2	Period 3	Period 4	Period 5	Lunch	Period 6
	Name: Rob	*Science*	*P.E.*	*Work Experience*	*Work Experience*	*Library*	*Campus*	*Computers*
IEP Objectives	1. Use Intro-Talker to initiate conversations with ND peers	S	S	S	S	S	S	S
	2. Use self-monitor checklist	ML		ML	ML			ML
	3. Order from snack bar						S	
	4. Transition independently to next class/activity	S	S	S	S	S	S	S
	5. Use watch to be on time	S	S	S	S	S	S	S
	6. Recognize correct bus stop and route			S	S			
	7. Model voice level of peers	CO	CO	ML	ML	CO	S	CO
	8. Use Apple II printer							ML
Management Needs	1. Written behavior plan	✓	✓	✓	✓	✓	✓	✓
	2. Peer assistants in classes	✓	✓	✓	✓	✓	✓	✓
	3. Intro-Talker (updates overlays)	✓	✓	✓	✓	✓	✓	✓

S = Same *ML = Multi-level* *CO = Curric Overlap* *A = Alternative*

* Adapted from L. LaPlant, Vermont

DAY 3 OH

PEERS

IEP OBJ./CLASSROOM SCHEDULE MATRIX

✓ = Opportunity to work on student's IEP objectives

Classroom Schedule

IEP Obj.											

PEERS

Classroom Activity Analysis Worksheet

☐ As is ☐ Physical Assist. ☐ Adapt Materials ☐ Multi-level ☐ Curriculum Overlap

Name ______________________________ Date ____________________

Activity ______________________________

Classroom activity steps	Student performance	Specific adaptations	Skills in need of instruction

Comments/Recommendations:

PEERS Project 1991

PEERS

Classroom Activity Analysis Worksheet

☒ As is ☒ Physical Assist. ☒ Adapt Materials ☒ Multi-level ☒ Curriculum Overlap

Name Anna H.

Date May 24, 1991

Activity Morning Circle

Classroom activity steps	Student performance	Specific adaptations	Skills in need of instruction
Sit down on mat	Pulled down by peers; no chance to try independently	Allow more time	Standing to sitting; move to knees first
Listen to teacher	Focused on teacher, good attending		
Acknowledge name during attendance/lunch count	Assisted by peers to look, raise hand, sign Anna	Teacher cue to get ready; **one** peer to assist	Raise hand when name is called
Contribute to conversation	Attended; no opportunity to observe	Conversation book; teacher says, "Show us" and allows 20 sec for response before prompt	Shares information at least one time per week by holding conversation book or item up
Calendar	No opportunity to observe	Assist to place numbers; peer counts with her	Place date numbers, days on calendar
Stand for salute; salute flag;	Pulled to standing, no assist by Anna	Start early with cue	Stands independently; places hand over heart
Go to desk (by category)	No opportunity to observe, held by teacher	Peer to prompt regarding category	Walks independently; follows directions
Sit down	Needs assist to pull out chair	Chair out already	Sits independently; adjusts chair

Comments/Recommendations: Assign one peer for Anna per week versus two who change each day. Provide instruction to peers about overassistance and waiting to prompt until Anna gets a chance to try. Discuss with OT/PT re: standing to sitting/sitting to standing- what's the best strategy? Need to provide more time for responses- cue by support staff/peer prior to request or change of activity?

Neary/Mintun 1991

PEERS

Classroom Activity Analysis Worksheet

☒ As is ☐ Physical Assist. ☐ Adapt Materials ☐ Multi-level ☒ Curriculum Overlap

Name Dylan

Date June 92

Activity Brainstorm

Classroom activity steps	Student performance	Specific adaptations	Skills in need of instruction
Goes to desk (category)	Independent 60% of the time; will visit peers, take pencils	Specific directions	On task focus: eye contact, increase attention span.
Attends to teacher	Able to follow when teacher is talking; Easily distracted.	Desk close to rug area; materials close to desk.	
Follows directions	Able to follow 2-3 step directions; Great in routine situations.	Periodic check to see if Dylan has information.	Concentration skills. Request assistance.
Contributes to brainstorm	Able to give ideas in 1-2 words, words may be difficult to understand.	Teacher provides clues; Peer prompts.	Articulation skills.

Comments/Recommendations: Talk with speech therapist re:how to work on articulation skills; providing in-class support. Discuss with circle of friends re: how to get Dylan to leave pens, pencils alone.

PEERS Project 1991

PEERS

Classroom Activity Analysis Worksheet

☒ As is ☒ Physical Assist. ☒ Adapt Materials ☒ Multi-level ☐ Curriculum Overlap

Name Dylan

Date June 1992

Activity Journals

Classroom activity steps	Student performance	Specific adaptations	Skills in need of instruction
Listen to directions	Usually able; needs consistency	Simple directions; provide more time.	
Reads from board w/peers	Unable to read-knows 10-15 letters	Peer support; point to each word.	Letter recognition; familiar words
Passes out books	Able when no names are on books or with peer to read names.		
Copies from board	Not able to copy from board	Dylan selects words; Light dot to do tracing.	Tracking skills-left to right/top to bottom; press firmly on pencil.
Listens to directions	Able to do this.		
Gets scissors	O.K.		
Traces around template	Independent on 40-50% of object	Peer or adult support to hold template if requested.	Holding template w/one hand, trace with other.
Cuts out shape	Cuts well except for turning paper		Coordination of both hands to cut and turn paper.
Obtains pens	O.K.		
Glues in shape	Uses excess glue	Large shapes; slow glue bottle or stick	Recognize proper amount of glue
Cleans hands	O.K.		
Puts book on table	O.K.		

Comments/Recommendations: Be sure Dylan is looking in the direction of the speaker when giving directions. Utilize peers supports whenever possible. Identify a list of familiar (to Dylan) words for him to start writing. Build his vocabulary list this way over the year.

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Classroom Activity Analysis Worksheet

☐ As is ☐ Physical Assist. ☐ Adapt Materials ☒ Multi-level ☒ Curriculum Overlap

Name Bob

Date January 1992

Activity Computer class: Personal Word Processing

Classroom activity steps	Student performance	Specific adaptations	Skills in need of instruction
Arrives on time	Enters 2-5 minutes late Talks loudly as he enters	Coach prior to class Get pack ready	Control voice volume Walk slowly in room
Gets materials	Goes independently to file Talks loudly to self Gets other's files	Keep file in a separate place	Learn short phrases to ask for assistance (Hi!; How are you?; nod, smile) when passing.
Selects work area Begins program	Independently selects a computer table near peers; Tries to cram disk in Talks loudly Selects menu independently	Get peer to help w/disk Use phrase sheet Use "Keytalk" or easy word processor	Teach phrases to ask for help Hold disk correctly
Types program information	Types simple words; forgets (or is not motivated) to save material; Conitnues to talk loudly; gets frustrated at times	Use 3X5 cards; Type for short periods of time Peer prompt to relax Provide choices	Relaxation time (breathe, etc.) Observe what others are doing Take a break How to make choices
Prints work typed	Erases words when he is finished Knows "print" functions	Peer or staff help to print	Save material Give finished work to instructor

Comments/Recommendations: Develop self-monitoring sheet to reinforce steps and on-task behavior. Instruct peers to teach/remind when to relax, talk quietly. Teach peers conversation skill program. Assist instructor to collect finished work and return w/comments for reinforcement. Discuss w/parent to reinforce also. Give choices of materials to type and print.

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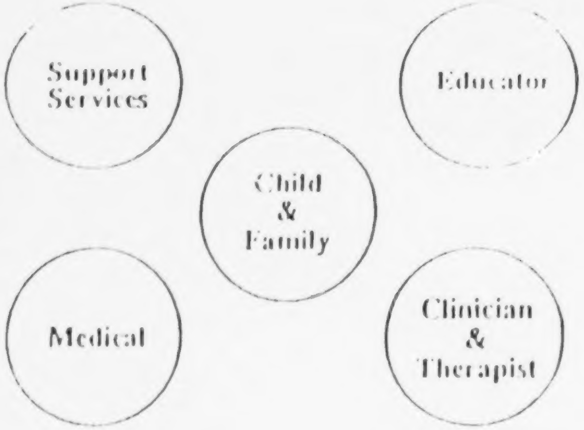
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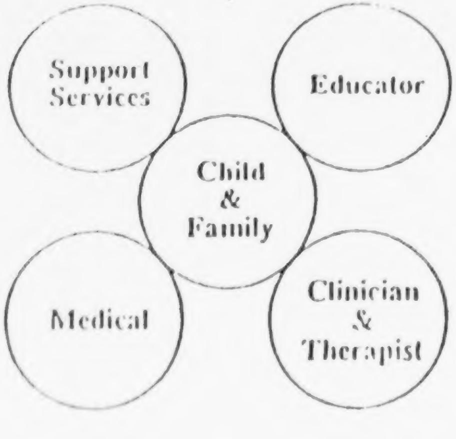
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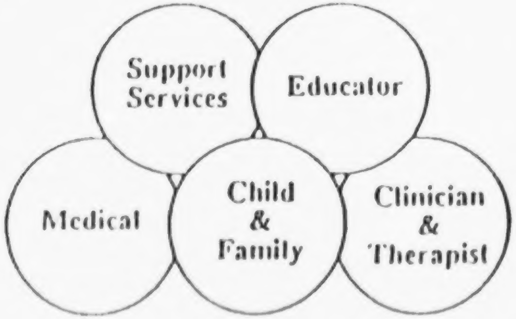
Support Services
Educator
Medical
Child & Family
Clinician & Therapist

Multidisciplinary Approach

Each professional works independently with the child and family. Observations and information may be exchanged during staff meetings. Each discipline decides on and carries out their own recommendations. Family members interact with each professional separately.

Interdisciplinary Approach

Professionals work jointly with the child and family, but specific discipline roles are maintained. Observations and information are exchanged during formal meetings. Group decisions are made, but staff roles determine who will carry out recommendations. Families work with several different professionals, who maintain their discipline roles.

Transdisciplinary Approach

Professionals and family members work together. Professionals and family members exchange information and observations and train each other in their area of expertise. Recommendations are jointly arrived at, roles are integrated, and a total program is provided for the child and family.

Adapted from: Wisconsin Department of Public Information, Teaching Early Childhood Exceptional Needs: Ten Resource Modules, 1979.

PEERS

CRITICAL SKILLS SCHEDULE

Name ______________________________

Activities/Routines/Environments

Critical Skill Needs

Language Arts	Recess	Sharing	Math	P.E.	Lunch	SSR	Social Studies/ Science
Use name stamp	Walk with Peers to playground	Looks at speaker	Uses name stamp	Makes choice of activity	Walks to lunch table	Touches pictures on request	Cuts and pastes
Transfer to chair	Signs "More"	Stands/holds item to share	Takes turns	Climbs on equipment	Asks for help when needed	Looks at book independently	Walks to center or group
Follow verbal directions	Makes choice of activity	Uses communication book	Uses math manipulatives	Signs "More"	Makes choices	Listens to tape with earphones	Transfers to chair
ID pictures in story	Climbs on equipment	Goes from sitting to standing	Uses computer	Holds rings	Wipes mouth	Listens & watches pages when being read to	Signs to communicate "more" or "finished"
Turns book pages		Uses conversation book	Responds to "Give me..."				
Signs to communicate "more" or "finished"							
Uses computer							
Uses crayons to apply to paper							

Adapted from McGrath

PEERS

CRITICAL SKILLS SCHEDULE

Name ______________________________

	Activities/Routines/Environments							
Critical Skill Needs								
		531					532	

Adapted from McGrath, 1991

PEERS

PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

PROJECT DIRECTOR
Patrick Campbell, Asst. Superintendent/Dir
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3567
(916) 657-5086 FAX

REGIONAL OFFICES
Tom Neary
650 Howe Avenue
Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D
Ed. Psychology Dept.
CSU, Hayward
Hayward, CA 94542
(510) 881-3087 or
(415) 338-7849

Suzanne M. Gilbert
El Toro HS, Room 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8558
(714) 837-5066 FAX

Steve Johnson, Administrator
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3256
(916) 657-5086 FAX

SCHOOL SITE TEAMS
DAY 4

OBJECTIVES

Participants will:

1. utilize curriculum balancing techniques to examine and negotiate general education and functional curriculum priorities.
2. acquire new strategies to support inclusion of students with behavioral and/or health issues OR:
3. acquire information on cooperative learning or consultative/ collaborative strategies and their application in inclusive settings.
4. participate in planning how to schedule for school and community instruction.
5. further develop team action plans.

AGENDA		page number
8:30	Objectives/agenda	
8:40	Team reports	58
9:15	Functional curriculum approach	59
10:00	Role play scenarios regarding curriculum balance	62
10:15	BREAK	
10:30	Continue role play scenarios	
11:10	Report out on role plays	
11:30	Team planning	64
12:00	LUNCH	
1:00	Topical workshops	64
	*cooperative learning/alternative instructional strategies	65
	*nonaversive behavioral support	69
	*specialized health care/integrated therapy	74
	*consultation/collaboration	76
2:30	BREAK	
2:45	Expert group sharing on topics	82
3:15	Team planning	82

MATERIALS

Topic: Team Reports (35 min.)

8:40

TRAINER'S NOTES

To begin this morning, we would like to give you an opportunity to report on what you have accomplished during your team planning time. Let's have three teams volunteer to report on your action plans. Please focus on your instructional planning teams and utilizing natural supports at your sites.

DIRECTIONS

Provide about 5-10 minutes for each team to report on action plans. Stress concrete actions with definite responsibilities and timelines stated. Suggest that other participants comment on team action plans to offer suggestions.

MATERIALS

Topic: Functional Curriculum Approach (45 minutes)

9:15 AM
TRAINER'S NOTES

In examining inclusive education, it's critical that we look at it in context of the history of this relatively young field. Services for persons with severe disabilities have evolved in a way that has been described as "progressive integration". That is, we've continually moved toward more and more involvement in natural, integrated community environments.

Overhead
Slide projector
Screen
Wall charts
Pens

DIRECTIONS

Note the supported living changes (i.e., community Supported Living Arrangements; Supported Employment and integrated recreation). Trainers should provide familiar examples from their own experience.

TRAINER'S NOTES

When we ask educators what the purpose of education is for persons with severe disabilities, we typically hear, "to make them as independent as possible"; "to improve their quality of life"; "to integrate them into society"; "to make them productive"; "to have them be valued by society".

It might be helpful to define some of these terms. (Share definitions of *independence, productivity* and *integration* here)

Overhead:
Independence
Productivity
Integration

It might also be important to define what we mean by quality of life. Take a few moments to jot down some notes about this concept. What things are important to you in terms of your own quality of life? Think of things in terms of where and how you live, your employment, your access to community activities.

DIRECTIONS

As a large group discuss what participants identify as important to them. What things do they value in their living , work, recreational and community environments, such that if they lost any one of these, their quality

Handout:
Quality of life exercise

Topic: Functional Curriculum Approach *(Continued)*

of life would suffer. Next, have them consider people who experience significant disabilities. Ask how these same quality indicators are reflected in their lives. The purpose is to demonstrate how critical it is to provide services in quality contexts, environments and learning experiences.

TRAINER'S NOTES

The outcomes of our educational services for students with disabilities, particularly those students whose disabilities are severe, are often not independence, choice, participation in the same activities and environments we have. People are commonly placed into group homes, placed into sheltered vocational or activity settings and taken in groups to recreational activities.

It's important for us to constantly examine what part we play in these undesirable outcomes.

DIRECTIONS

Using slides, show the history of services, noting the earlier developmental approach focused on "readiness to participate". Show the age-inappropriate nature of curriculum, the non-functional materials and activities, the congregation of students with disabilities.

Ask the group what assumptions were being made in providing these activities and materials. Ask also what the likely outcomes of this would be.

Ask the participants as a large group, what would be the best way to generate curriculum for students who have difficulty learning. Generate the list on wall chart paper. (Trainer's might discuss Donnellan's "Criterion of the least dangerous assumption" here).

Next show the move to a more functional curriculum, still classroom based, but at least more functional. Make the point that our field was learning about the importance of context and meaningfulness in student acquisition and maintenance. Discuss how this led to the movement during the 1970's out into the community. Using slides, show examples of domestic, recreational/leisure, community and vocational instruction.

MATERIALS

Slides showing examples of developmentally-based curriculum

Wall chart; pens

Overheads
Criterion of the Least Dangerous Assumption

Slides - functional curriculum

Community-Based Instruction slides

Topic: Functional Curriculum Approach *(Continued)*

Finally, end with slides demonstrating students involved in integrated school and classroom based activities and discuss the likely outcomes for this type of curriculum.

TRAINER'S NOTES

With the need for teaching functional skills in meaningful ways, and the importance of students being involved as full time members of regular classes with age-mates, there might be a conflict. In fact, there is some disagreement in the field about where students need to spend the majority of their time. What is important is that we remember that each student is different and that our planning process is the best place to determine how instructional time will be spent. Our first question should be, "Can this student's needs be met in his/her general education classroom?"

DIRECTIONS

Refer to Lou Brown' et al's (1991) article, "How much time should students with severe intellectual disabilities spend in regular education classrooms and elsewhere? JASH, 16, (1), 39-47. Lead into the curriculum balance exercise.

MATERIALS

Inclusion slides

Handout:
Calif. Dept. of
Education:
Family Interview. 1992.

Topic: Functional Curriculum/Curriculum Balancing (90 min.)

10:00 AM
TRAINER'S NOTES

We're going to give you an opportunity now in your teams to look at curriculum balancing, to examine the schedule and tentative objectives for a specific student and to work together to negotiate instructional priorities for that student. We have profiles describing two different students, Jenny, a seven year old in first grade, and Bill, an eleven year old who will be making the transition to middle school. First, we suggest that you select the student who comes closest to the students you are planning for at this time. Second, we'd like to assign your team one of the three scenarios that accompany each student's description.

DIRECTIONS

Hand out student profiles and scenarios.

TRAINER'S NOTES
The scenarios describe several players who are involved in the student's team, and their desires or priorities for the student's program. We suggest that you take on a role that is different from your own role at this time, to get a feel for another perspective. Let's take the remainder of the time before break (10 minutes) to read and digest the information you've received, and to select your student. We'll assign your scenario by number now. After break, you'll have 40 minutes to develop and play out your scenario and negotiate priorities for Jenny or Bill.

DIRECTIONS

Have teams count off by 1-3. They will then play out the roles in the scenario with that number, for whichever student they select. Groups read until break.

10:15 AM- 10:30 AM BREAK

MATERIALS

Copies for all:
1. Bill-profile with IEP objectives, class schedule and scenarios.

2. Jenny- profile with IEP objectives, class schedule and scenarios.

3. Curriculum balance worksheet.

INCLUSIVE EDUCATION

MATERIALS

Topic: Functional Curriculum/Curriculum Balancing (con't.)

10:30 AM
DIRECTIONS

Teams assign roles for their scenario. Role play until 11:10. Trainers circulate among teams to assist and observe. Let groups know when it's 10 minutes before closing, then 5 minutes before, etc. At 11:10, ask groups to stop and request team reports. As teams report, have one trainer facilitate and one record on chart paper. Post chart papers around the room.

Chart paper
Easel
Markers

TRAINER'S NOTES

Let's hear from each of your teams now. We have 20 minutes, so we'll have about 3 minutes per team. We'd like you to let us know which student and scenario you had and:
-how it felt taking on a different role; did it provide any new insights?
-how the negotiation process went; who facilitated the meeting; was it a collaborative discussion; did people seem to value each other's viewpoints?
-what was one result of your negotiations regarding this student's instructional priorities?
-what would be your next step as a team in this case?

In closing, it appears that your teams struggled somewhat with working together around an unfamiliar student and in different roles than you're accustomed to. We want you to think about this as you try to move forward as a planning team and work on inclusion for future students in your home districts. Working as a team, collaborating, is hard work. The pay-offs for students and staff are significant, but it takes time to get there- don't get discouraged! Reward yourselves for the progress you have made this week. Collaboration is the how, the process, not the end product, but we need to collaborate to get there. We all need to work on our skills in working together, and we hope this week continues to reinforce those skills. We'll now go to team planning time until the lunch break. After lunch, we'll go directly to the group workshops for 90 minutes. Remember to sign up such that your team distributes itself equally across the workshops. Each of the areas addressed is critical to providing effective inclusive education for all students who experience severe disabilities.

Site Team Planning/Topical workshops

11:30
DIRECTIONS

Have people meet for the next 30 minutes to work on their site action plan, and to finalize selections for the afternoon workshops.

1:00
DIRECTIONS

Provide overall activity directions. Arrange tables/chairs into four groups with signs to designate topics and expedite seating.

MATERIALS

Workshop topic signs

Overhead projectors
Easels
Wall charts
Pens
for each group

INCLUSIVE EDUCATION

Topic: Cooperative Learning (90 minutes)

Workshop #1
DIRECTIONS

Four emphases will comprise this mini-workshop: 1) jigsaw activity on grouping strategies, 2) summary of ten documented benefits of cooperative learning, 3) creating a cooperative classroom environment and 4) seven examples of cooperative structures in action. Divide your participants into groups of four for the first jigsaw activity (see handouts). The four groups then review and discuss their material, and then come back together to the large group to share information. The remainder of the session is conducted with the full group.

TRAINER'S NOTES

Let's open with a cooperative activity. We're going to do a jigsaw again, where you'll count off into four groups and each review a section of the material. You'll be reviewing material for the next 20 minutes in support of a specific grouping strategy. When you return, you'll have 5 minutes each to debate in favor of your strategy over the other three.

DIRECTIONS

Groupsbegin review and discussion and come back together after 20 minutes. Spend up to 20 minutes total, debating which strategy, or combination of strategies appears to be most effective. Summarize the main points on chart paper.

MATERIALS

Overhead projector
Wall chart
Pens

Handouts:
1. Four corners; Roger & Gorevin, 1991. SAFAK, used with permission.
2. Benefits & Outcomes (also on overhead)
3. Essential elements of cooperative learning.

Slavin, R. (1991). "Synthesis of research on cooperative learning" Educational Leadership. 48 (5).

INCLUSIVE EDUCATION

Topic: Cooperative Learning (con't.)

TRAINER'S NOTES

In summary, I hear you raising points in favor of each strategy, given specific situations. For example, *ability grouping* may be effective for one particular area at certain times of day, but whole class ability groupings, or tracking, does not enhance achievement for elementary school students. *Skill-based groupings* have demonstrated mixed results, but are helpful in clarifying the skills needed by each student and communicating those areas not yet mastered when discussing student progress. *Multi-dimensional performance grouping* has the positive feature of consciously grouping students on dimensions besides ability (e.g. student interests), or by using a multi-task approach. Finally, however, we see that *cooperative learning structures* promote higher achievement than do competitive and individualistic learning experiences.

Lets look further at outcomes/benefits of cooperative learning which are well-documented by some of the research reviewed in your handouts.

DIRECTIONS

Show the overhead on Benefits and give as handouts Overhead # 2 to follow. Review each point and discuss how/why you would expect to see this outcome in cooperative situations. (10 min.)

TRAINER'S NOTES

Mara Sapon-Shevin has written some very helpful guidelines to set the stage for cooperative classrooms. For example, she suggests that we dispense with competitive symbols such as star charts and other visuals that indicate who's "doing well" and therefore, who isn't. She talks about using the "visitor criterion"- if someone can tell who is succeeding by a brief classroom observation, then the atmosphere probably exemplifies competition, not cooperation.

550

MATERIALS

Suggested references:

Johnson, D.W. & Johnson, P.T. (1989) "Cooperative learning and mainstreaming". In R. Gaylord-Ross (Ed) Integration Strategies (233-248). Baltimore: Brookes,

Overhead #1
Benefits (also handout)

Sapon-Shevin, H. (1990) "Student support through cooperative learning". In Stainback & Stainback (Eds) Support Networks for Inclusive Schooling. (65-79). Baltimore: Brookes.

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MATERIALS

Topic: Cooperative Learning (con't)

TRAINER'S NOTES

The use of inclusive language is Sapon-Shevin's key point. Use terms like "students", "class" or "kids" as opposed to "boys and girls" or references to specific groups. Don't make better/worse comparisons among groups, or call attention to one student's exemplary behavior. Instead, try to position standards as a group problem-solving effort, i.e. "what can we all do to make sure papers are turned in on time?"

Building the classroom community is essential to a cooperative setting. Facilitate activities that draw students together, e.g. singing, writing and producing plays, operating a class business or service, etc.

The roles students take on in these activities can help to encourage their interdependence, and use of each other as resources. Study partners, peer coaching, small group problem solving, and developing a classroom "yellow pages" which lists skills, talents and resources of students are examples of this.

Sapon-Shevin also suggests ways to encourage students' recognition of each other's accomplishments through, for example, a "good deed tree" where students put up each other's names, or a Secret Santa program, both of which are activities where all students can succeed, and be glad for each other.

Finally, the use of literature to teach and promote cooperation can be very effective. Sapon-Shevin recommends several elementary level books, and also suggests that the class develop a book of their cooperative activities that shows what they've done that they would not have accomplished alone.

All of these activities can be of significant assistance in **team-building**, an essestial element of cooperative learning.

Overhead #2:
Creating a cooperative classroom environment

Topic: Cooperative Learning (con't)

DIRECTIONS

Review the Essential Elements handout. Ask participants for examples from their experience, for example group social skills instruction, or how they addressed or would address individual accountability.

TRAINER'S NOTES

Now that we've reviewed the essential elements of cooperative group structures, let's talk about some specific examples of grouping strategies where a student with disabilities would be an active participant, and where meaningful objectives could be addressed.

DIRECTIONS

Review and discuss examples of cooperative lessons. Ask participants to brainstorm additional examples. List on chart. Remind participants that it will be important for them to find a way to share the strategies discussed here with the rest of their team, and to find out, during this week, what they learned in the three other mini-workshops.

MATERIALS

Overhead #3:
Essential elements

Overhead #4:
Implementing Cooperative
Learning: Examples

INCLUSIVE EDUCATION

MATERIALS

Workshop #2
TRAINER'S NOTES

Topic: Nonaversive Behavior Change (90 minutes)

For many behaviors, natural, socially validated consequences work. Correcting students for their behavior, loss of privilege, even expressing your anger in enough. Sometimes, however, these consequences will not be enough to support real change.

It's when these natural reactions do not work, when the behavior either continues uninterrupted or simply re-occurs again and again that we need to examine what it means.

How do we define behavior management?

1. The quick weight loss program?
2. Suppression?
3. Better ways to deal with a problem from the learner's perspective?

Overheads:
Quick Weight Loss
Newman, (1961)
Behavior Cycle

One thing that seems to work for us is to move away from labeling behavior as "good" or "bad". It's actually the person's best way of dealing with a situation. It may not be the best way in our eyes, but it obviously works for the person who uses it.

DIRECTIONS

Have participants list behaviors they have a concern about. Next, have them generate a list of how each of these behaviors are typically addressed. This activity demands that trainers prompt honesty here. Probe for the real truth, we're not always consistent. We do occasionally reach the end of our rope. We do sometimes find ways to avoid behaviors.

Wall chart
Pens
Overheads:
Challenging Behavior
Why I behaved...
Did anyone say..

Go back and take any of the behaviors and discuss with the group how each of us has also used this behavior at some time in our life. Ask "What helped us, then?" "What would have helped us?" Did any of us say, "Please put me in time out"? or "Please take away my free time, that will help"?

Topic: Nonaversive Behavior Change *(Continued)*

TRAINER'S NOTES

Approaches in our own life tend to be supportive in nature. Approaches to our students' situations focus on changing them.

Behavior is the best way (we know) of dealing with the events, stresses, changes, feelings we have in life. To ask our students to just drop that strategy, no matter how odd it seems to us, is crazy.

Look at the wide range of skills we have to deal with stresses and other situations in life. When we're angry, what do we do? When we're stressed? Disappointed? Bored?

DIRECTIONS

Have participants list the strategies they use in these situations.

TRAINER'S NOTES

The first step in supporting a behavior change is to recognize that it makes sense to the behaver. Even if s/he doesn't consciously think about it, it's his/her best strategy. With this in mind, it's obvious that our job is to either identify and help remove the situation that promotes the behavior problem or teach the person a better, more socially validated strategy of dealing with that situation.

DIRECTIONS

Share the overhead on assessment and intervention. Note the importance of gathering information and generating a hypothesis to test before determining how to intervene. Ask what this approach might prevent.

TRAINER'S NOTES

The first step is to gather information on when, where, with whom and how often this behavior is occurring.

MATERIALS

references:

Carr, E.G. & Durand, V.M. (1987)."See Me, Help Me" Psychology Today, Nov.

Evans, I. & Meyer, L.H. (1985). An Educative Approach to Behavior Problems. Baltimore: Brookes Pub. Co.

Hitzing, W." Support and positive Teaching strategies". in (Eds.) Stainback & Stainback, Curriculum Considerations in Inclusive Classrooms. (1992). Baltimore: Brookes Pub. Co.

Overhead:
Think about a person..

Overhead:
Assessment

INCLUSIVE EDUCATION

MATERIALS

Topic: Nonaversive Behavior Change *(Continued)*

DIRECTIONS

Share the A-B-C format. Note the kind of things that might be identified. (Time of day, person, activity, preceding activity, next activity, group size, location etc. with examples).

Overhead::
A-B-C data instrument

TRAINER'S NOTES

It's not surprising to find that many students with problem behavior also have communication problems. Either verbal speech is not present or it is not functional for the student. One of the ways to help solve problem behavior is to examine the current communication repertoire of the student. One tool available is from Schuler and colleagues. It's a simple interview to identify the student's current communication strategies and may help demonstrate how much communication the student has and the ways it is being used.

Overhead:
Communication assessment (Peck, Schuler and Semmel, 1984).

DIRECTIONS

Demonstrate the Communication Interview, here. It might be helpful to interview someone from the group using this tool. The focus should be on how the individual communicates and to show that every person communicates in the best way they know.
A second strategy, if there is time, is to pair people up in dyads and have one interview the other and then discuss the findings.

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MATERIALS

Topic: Nonaversive Behavior Change *(Continued)*

TRAINER'S NOTES

The focus of our discussion to this point has been in gathering information. First, do we really have a problem? When is it likely to happen and where? If we can predict the problem behavior, we've been successful in gathering the right kind of information and we've gone a long way to solving it for the student.

DIRECTIONS

Ask someone in the group to provide their best guess about a behavior previously discussed. Ask how they would test their hunch. Hypothesis testing should show that we can predict the situations that will likely support problem behavior.

TRAINER'S NOTES

Our next step is to consider what we can do with our information. Our focus should be on what changes we can make in the student's environment to preclude the occurrence of this behavior.

Overhead:
Behaviors of concern

DIRECTIONS

Using an example provided by a participant and discussed during this session, generate with the group possible change in expectations, assignments, groupings, environmental conditions, etc.

TRAINER'S NOTES

Next, what does this person need to learn that will provide a better strategy than the one s/he's got to deal with the situation that promotes this behavior?

DIRECTIONS

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INCLUSIVE EDUCATION

MATERIALS

Provide an example of a student you know who uses a behavior that is not appreciated to deal with something in their life. Generate with the group other more appropriate ways to communicate the same thing.

Topic: Nonaversive Behavior Change *(Continued)*

TRAINER'S NOTES

Finally, what will we do when the problem behavior occurs, even though we've got a good program going? More than likely it will occur from time to time. What's important in our manner of handling the behavior in light of what we've spoken about today?

DIRECTIONS

Generate ways to manage problem behavior on the spot that reflect respect for the individual and recognition that the individual needs help to pull himself together. Point out that these reactive strategies should be ones that contain the behavior, and are not designed to be behavior change strategies. They also should not contribute to reinforcement of the problem behavior.

Ask for questions, comments.

Have participants return to their teams to share this information with them.

INCLUSIVE EDUCATION

Topic: Specialized Health Care and Integrated Therapy (90 min.)

Workshop #3
TRAINER'S NOTES

As full inclusion becomes the preferred structure within which special education services are provided, questions begin to arise concerning how some of those services are actually going to be handled within general education environments. Two areas of special concern are specialized health care and therapy, especially physical and occupational therapy. People begin to wonder about educating medically fragile children in regular classrooms. They begin to worry about spreading limited therapy resources around to neighborhood schools. The issues are real and they are important. This afternoon, we would like to spend some time exploring these issues. Our objectives this afternoon are to clearly define *specialized health care services* and *integrated therapy* and to discuss some of the issues involved and some of the strategies to handle the issues, and to identify good practices in providing these services as part of fully inclusive schooling.

Much of the information covered this afternoon is drawn from the books and articles listed in the bibliography included in your handouts.

DIRECTIONS

Share the handouts on specialized health care with participants as you describe them. Following the definitions of these terms, it would be extremely helpful to outline for participants the legal background for the provision of these specialized services. The point of the legal discussion is to make it clear that there are no final clear guidelines on what must be provided and how it is to be provided. Legislation and court decisions have not yet led to clear overall guidelines. A very good summary of the legal situation with regard to related services is provided in Rainforth, York & MacDonald, Collaborative Teams for Students with Severe Disabilities, *(1992). Their summary can be used for this part of the discussion. After the legal perspective, use small group or large group discussions to generate lists of issues in providing specialized health care and integrated therapy services.*

MATERIALS

Handouts:
1. Specialized Health Care and Integrated Therapy definitions.
2. Issues
3. Good practices

Wall charts
Easel
Marking pens

INCLUSIVE EDUCATION

MATERIALS

Topic: Specialized Health Care/Integrated Therapy (Con't.)

DIRECTIONS (Con't.)

Use large group discussion to generate ideas for solutions to challenges that the issues represent. You may use the list provided of typical issues to get discussion started. Finally, spend some time in group discussion of good practices in providing specialized health care and integrated therapy.

TRAINER'S NOTES

We certainly do not have all the answers to providing all related services within general education environments, but when people work together in a problem solving manner, usually individual plans can be provided for all needs.

INCLUSIVE EDUCATION

Topic:Collaborative Teamwork for Students with Severe Disabilities (90 min.)

Workshop #4
TRAINER'S NOTES

The purpose of this module is to gain an understanding of the collaborative model, and how it can benefit the education of children.

DIRECTIONS

The first activity is to have the group break into several small groups and have them complete the "wordsearch" together. Give the groups 15 minutes. Do not provide organizational hints. Let the individual groups decide how they will complete the wordsearch as a team. The leader's only instruction is that the wordsearch needs to be completed as a team project.

At the end of the 15 minutes, call for closure of the activity. Ask for any team that found all the words (18 total). Reward any team who "collaborated" together to complete the wordsearch and found all the words. Reward all the groups for their collaborative efforts.

Ask the group to share what kinds of strategies evolved from their group collaborative process. Write what the group generates on the flip chart. (5 minutes). Effective listening and communication strategies should be evident.

TRAINER'S NOTES

Collaborative teamwork can be effective in developing, implementing and supporting educational programs for children, in particular, for children with severe disabilities.

MATERIALS

Teamwork Wordsearch worksheet

Pieces of candy or other rewards

Flip chart/pens

Handouts:
"Collaborative Teaming to Insure Successful Inclusion".

"Techniques for Effective Communication".

Topic: Collaborative Teamwork for Students with Severe Disabilities

TRAINER'S NOTES

The goal of a collaborative educational team is to design and implement programs in which individual students achieve their educational goals. (Rainforth, York, MacDonald, 1992).

Collaborative teamwork is an essential component of the program design for educating students with severe disabilities for several reasons.

1. The learning and performance characteristics of this heterogeneous group of students make collaboration essential. (Brown, Branston, Hamre-Nietupski, Pumpian, Certo, Gruenewald, 1979); Falvey, 1989)

2. Collaboration results in more effective problem solving and enhances support among team members, (Johnson & Johnson, 1989).

3. The collaborative effort among team members will ensure the implementation of the best curricular and instructional practices for students with severe disabilities (Idol, Palucci-Whitecomb and Nevin, 1986; Williams, Fox, Thousand and Fox, 1990).

4. Legal mandates and precedents support a collaborative model.

5. Recent versions of guidelines for the practice of therapy in educational environments support a model of team collaboration.
   (Taken from Rainforth, York and MacDonald, 1992: Collaborative Teams for Students with Severe Disabilities.

DIRECTIONS

Brainstorm for 5 minutes the benefits of collaboration.

MATERIALS

Overheads:
1. Collaboration/ Teamwork/ Educational Literature
2. Collaboration
3. Reasons to collaborate

Chart paper
Easel
Pens

MATERIALS

Topic: Collaborative Teamwork for Student with Severe Disabilities

TRAINER'S NOTES

There are two primary benefits of collaboration:

1. Benefits are realized because of the diverse perspectives, skills and knowledge that is available from a variety of disciplines that are members of the team. This is a tremendous resource for problems solving and support.

Overhead:
"Benefits of Collaboration"

2. Group interaction, if structured for cooperative, as opposed to individualistic or competitive interaction, is both beneficial and powerful to the group process of working together.

Team members must work together to achieve their goal of developing an educational program for a student. The following are characteristics of collaborative teamwork:

1. Equal participation in the collaborative teamwork process by family members and the educational service providers on the educational team.
2. Equal participation by all disciplines determined to be necessary for students to achieve their individualized educational goals.
3. Consensus decision-making about priority educational goals and objectives related to all areas of student functioning at school, at home and in the community.
4. Consensus decision-making about the type and amount of support required from related service personnel.
5. Attention to motor, communication and other embedded skills and needs throughout the educational program and in direct relevance to accomplishing priority educational goals.
6. Infusion of knowledge and skills from different disciplines into the design of educational methods and interventions.
7. Role release to enable team members who are involved most directly and frequently with students to develop the confidence and competence necessary to facilitate active learning and effective participation in the educational program.
8. Collaborative problem solving and shared responsibility for student learning across all aspects of the educational program.

Topic: Collaborative Teamwork for Student with Severe Disabilities

DIRECTIONS

Go over the eight characteristics with the group, sharing examples and discussion. Be sure to emphasize the importance of participation by the family and the individual him/herself for which the educational program is being developed. Effective listening and communication skills should also be emphasized.

TRAINER'S NOTES

Who should be on the collaborative team? This can vary depending upon educational priorities for the individual student. Usually, team members are those who are directly involved in the development and implementation of the day-to-day educational program. For students with severe disabilities, the core team members usually consist of: the student, parent of family members, teachers (general and special education), communication specialist, physical/occupational therapist, and paraprofessional. Membership can vary, depending on the age of the individual and other related service needs. The important point to remember is all participants function as equal team members, each providing input in the team decisions about educational priorities; contributing to problem-solving efforts across all aspects of the student's program, sharing descriptive-specific knowledge and skills to promote student participation, and supporting the contribution of fellow team members.

DIRECTIONS

It might be helpful at this time to review with the group best practices for students with severe disabilities. Specific practices to consider are:
1. *Age-appropriate membership in neighborhood schools*
2. *Integrated service delivery*
3. *Social integration*
4. *Transition planning*
5. *Community-based instruction*

Overhead:
"Best Practices"

Topic: Collaborative Teamwork for Students with Severe Disabilities

DIRECTIONS (con't.)

6. *Curricular expectations*
7. *Systematic, data-based instruction*
8. *Home-school partnership*
9. *Systematic program evaluation*

TRAINER'S NOTES

Now, let's assume that our collaborative team is meeting and discussing program development and implementation- things are going along well. There has been group consensus on educational goals and objectives.
Then the discussion moves to how and when to provide support to the student to achieve their goals and objectives. All of a sudden the group consensus comes to a halt. The team cannot agree. Some team members seem angry. There's no movement in the development of the plan. Now what are you going to do?

Let's look at an eight step problem solving model. This model should be helpful in assisting the team to come to consensus.

DIRECTIONS

Review the model with the group and discuss each point.

1. *Set guidelines: no interrupting, no name calling, no put downs or rude gestures, no blaming. Agree to listen and problem solve.*
2. *The parties tell what they see as the problem.*
3. *The parties say what they heard the other say.*

Handout:
"Eight step Problem
Solving Model"

Neary, Halvorsen, Gilbert &Terry-Gage, PEERS, 1992.

INCLUSIVE EDUCATION

MATERIALS

Topic: Collaborative Teamwork for Students with Severe Disabilities

DIRECTIONS (Con't.)

4. *The parties say what their ideal solution would be.*
5. *The parties say what solution they are prepared to live with.*
6. *The parties agree to a solution all can live with.*
7. *The parties make a plan to carry out the solution agreed on.*
8. *The counselor follows up to see if the solution worked. All celebrate success, or if the plan is not working, go back to step 6, brainstorm other solutions, agree on one and try again!.*

TRAINER'S NOTES

What is key to remember here, is to actively listen to others and that it's important to acknowledge that some compromise is necessary. It's important for each team member to decide what solution s/he can live with, and that everyone agrees to the solution.

Potential Training Activity: Personality Styles (10 min.)

TRAINER'S NOTES

Now we're going to take a fun, quick personality test. The purpose is to help you look at your individual style. This can provide helpful information about your interactive style and how you may complement or irritate others. Your personality, the core of traits you entered the world with, tells you how to conduct yourself. Your unique personality iteracts with the world about you and it directs your emotional and rational reactions to those everyday life experiences. Understanding your personality style will help you to establish and maintain relationships with greater ease. And you can see the motives behind both your and other people's behavior.

Suggested:
"The Color Code"
Taylor Hartman
P.O. Box 87
Trabucco Canyon, CA
92678

MATERIALS

Topic: Topical Workshop Sharing/Team Planning

2:45
DIRECTIONS

Have participants return to their school site teams to share information from the topical workshop they attended. Trainers should be available to clarify information if necessary.

3:15
DIRECTIONS

Teams should take the remaining 45 minutes to meet to finalize their action plans, including information covered on day 4. Team members should select a reporter to share the team action plan on day 5 in the morning, or finalize plans for a creative alternative presentation that will involve all team participants (see note on page 89).

NCR Action Planning worksheets

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INDEPENDENCE

...THE EXTENT TO WHICH A PERSON EXERTS CONTROL OVER HER LIFE.

PRODUCTIVITY

...ENGAGEMENT IN INCOME PRODUCING WORK OR WORK WHICH CONTRIBUTES TO A HOUSEHOLD OR COMMUNITY.

INTEGRATION

...THE USE OF COMMUNITY RESOURCES THAT ARE USED BY NONHANDICAPPED CITIZENS....

.....from Developmental Disabilities Act 1984.

A DEVELOPMENTAL ADULT SERVICE MODEL-PROGRAM OPTIONS

NO PROGRAM

ADULT DEVELOPMENT CENTER

↑
5%

ACTIVITY CENTER.........

8%
↓

↑
7%

WORK ACTIVITY CENTER....

7%
↓

↑
12%

SHELTERED WORKSHOP.......

12%
↓

COMPETITIVE EMPLOYMENT

A DEVELOPMENTAL APPROACH TO CURRICULUM

SKILLS ARE LEARNED SEQUENTIALLY

EARLY SKILLS ARE PREREQUISITE TO FURTHER ORDER SKILLS

PREREQUISITE MILESTONES GET STUDENTS READY FOR PARTICIPATING IN THE REAL WORLD

LANGUAGE

PERCEPTUAL MOTOR

COGNITIVE SKILLS

GROSS MOTOR

SOCIAL/EMOTIONAL

THE CRITERION OF THE LEAST DANGEROUS ASSUMPTION

in the absence of conclusive data, educational decisions ought to be based upon assumptions which, if incorrect, will have the least dangerous effect on the likelihood that students will be able to function independently as adults.

Ann Donnellan, 1985.

Nature of educational materials and settings.

Artificial only..Natural

Age-appropriateness of curriculum

Mental age..Chronological age

Community reference

National norms..Local norms

Point of parent involvement

Input at IEP only..................................Curriculum ideas prior to IEP

Unit of instruction

Basic skill...Functional activity

Student grouping

Homogenous..Heterogenous

Degree of opportunity for interaction with non-disabled peers

None...Always available

IDEAL WAYS TO ASSESS

IDEAL WAYS TO TEACH

ICSM CHARACTERISTICS

(Individualized Critical Skills Model)

FUNCTIONAL ACTIVITY BASED

BASIC SKILLS ARE TAUGHT IN THE CONTEXT OF ACTIVITIES

ACTIVITIES AND ENVIRONMENTS ARE ALWAYS AGE-APPROPRIATE

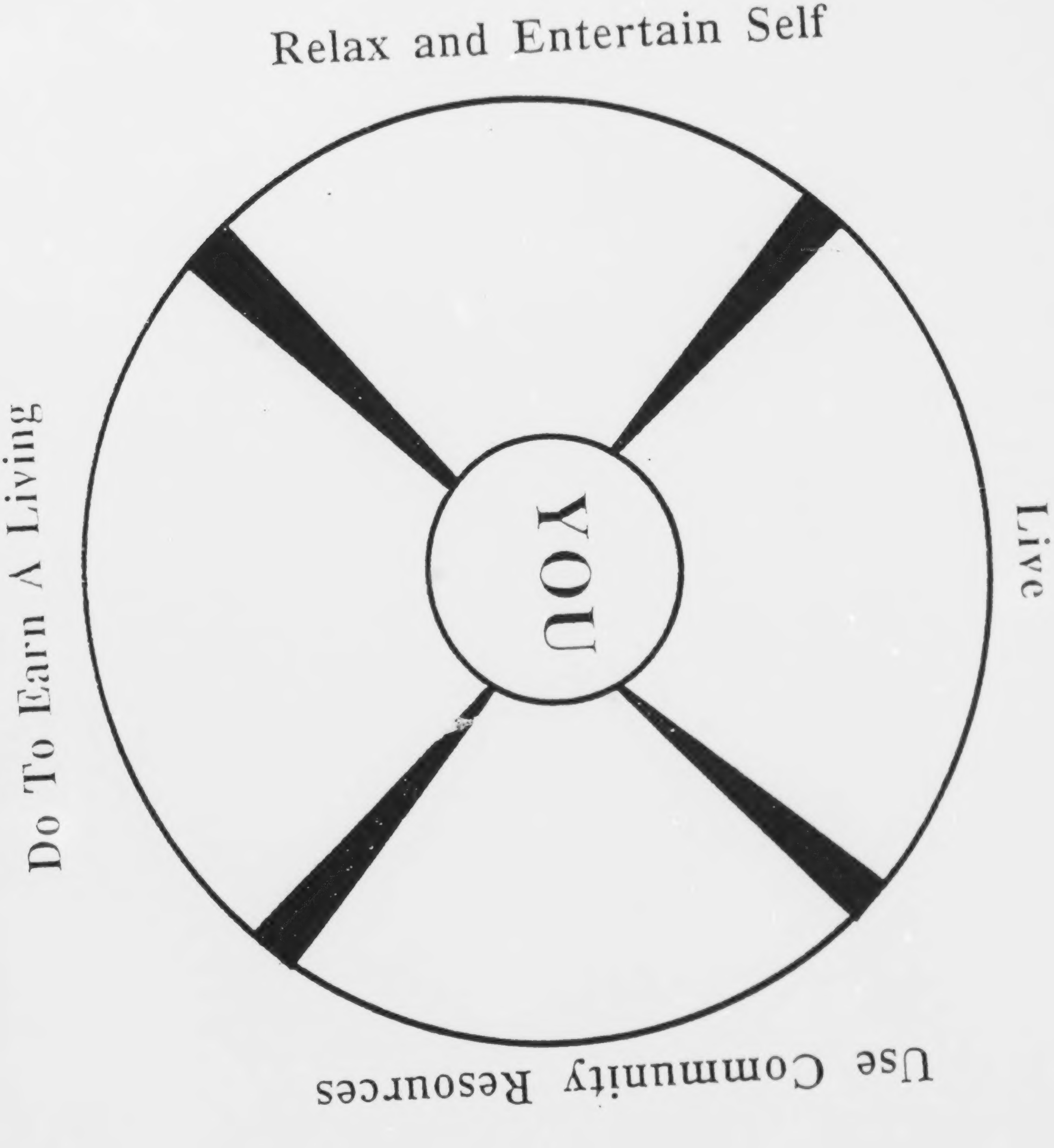
CURRICULUM IS PARENT AND STUDENT REFERENCED

INSTRUCTION TAKES PLACE IN NATURAL COMMUNITY ENVIRONMENTS INCLUDING THE REGULAR SCHOOL

CURRICULUM IS FUTURE REFERENCED

INSTRUCTION IS SYSTEMATIC AND ACCOUNTABLE

ALL STUDENTS PARTICIPATE IN INTEGRATED SETTINGS


Relax and Entertain Self
Live
Use Community Resources
Do To Earn A Living
YOU

Quality of Life Indicators

Dimensions that can be considered to measure the quality of someone's life include:

1. Degree of independence- the amount of control a person has over her life.
2. Degree of participation- a measure of "taking part in". How much unengaged time does he have?
3. Amount and quality of interaction with other people- how much of an effect does she have on others?
4. Degree of choice- the right of choosing among attractive alternatives; the number and quality of alternatives.
5. Variety in life- the number of different environments, persons, activities in life that allows experience with novel event, persons, materials.

Each of these dimensions can be taken across life skills domains-vocational, recreational/leisure, school/community and home. In assessing quality of life, how much independence, participation, interaction, choice and variety does this person have referenced against same age peers without disabilities? How can the degree and quality of each dimension be increased?

EXERCISE: Between now and next session, consider someone you know in terms of the quality of life indicators you've identified.

1. Which of these indicators reflect his/her life?
2. What changes can we make to support quality of life measures for this person?

Day - OH

Quality of Life Indicators Exercise

Quality Indicator	Degree/quality reflected	Changes

ICSM

FAMILY INTERVIEW

Interview date

Student

Birthdate

Address

Phone (Home) Phone (Work)

Directions to place of interview

Parent/Care provider's name

Other individuals to contact:

Name

Phone

Relation

Permission granted

Best time and day for contact

Phone

Best time and day(s) available for planning meetings

Local environments:

Medical considerations

Equipment considerations

Additional services providers (Regional Center, CCS, etc.)

Revised 6/92 • Gorevin, Kanda, Meinders, Neary, Perlroth; Training and Resources for Community and Curriculum Integration (TRCCI), Calif. Dept. of Education

WEEKDAY SCHEDULE

Student ____

List information from the time the student gets up and goes to school until the time he/she arrives home from school and goes to bed.

MORNING ROUTINE

Student participation	Area to target	Family	Student

TRCCI; 1992

WEEKDAY SCHEDULE

Student ______________________________

List information from the time the student gets up and goes to school until the time he/she arrives home from school and goes to bed.

AFTERSCHOOL ROUTINE

Student participation	Area to target	Family	Student

TRCCI; 1992

WEEKDAY SCHEDULE *(CONT.)*

EVENING ROUTINE

Student participation	Area to target	Family	Student

WEEKEND ROUTINE

Student participation	Area to target	Family	Student

TRCCI; 1992

BEHAVIORAL AND BASIC SKILLS INFORMATION

Student ____

Activities student likes to do/does not like to do

How does s/he let you know? *(If parent is providing information)*

Interaction student enjoys/does not enjoy

How does s/he let you know?

Tell me about friendships/relationships. What are some of the things your child does with friends?

What are your dreams for you son/daughter?

Is there any additional information about your son/daughter that we haven't talked about regarding:

Communication (receptive/expressive)

Mobility

Toileting

Foods/drinks s/he likes or dislikes

Are there any behaviors of concern?

TRCCI; 1992

BEHAVIORAL AND BASIC SKILLS INFORMATION *(CONT.)*

How do you deal with problem behaviors?

Describe the best way for your childto learn a new skill.

Describe your child's opportunities for decision/choicemaking

List some of your child's strengths.

How does your child problem solve? Make decisions?

MEDICAL

Medications used ____________________

When ____________________

Physician ____________________

Allergies ____________________

Side effects of medication ____________________

Impact on learning ____________________

Other ____________________

What things that we haven't talked about yet are important to you or other family members?

BEHAVIORAL AND BASIC SKILLS INFORMATION *(CONT.)*

	Student	**Parent**
How do you feel about the school program?		
Types of support you would like?		
What are your preferences for:		
Extra-curricular activities?		
Classes/subjects		
Activities		
Clubs		
Jobs		

	Parent
How would you like to be involved in the school?	
What is the best way for us to communicate?	
What are some of the benefits you see as a result of the school program?	

FAMILY PREFERENCE FOR ACTIVITIES AND ENVIRONMENTS

Student ______________________________ Date ______________________

1. List the prefered activities (not basic skills) and environments for one, two or three years from now in each of the following areas. INTERVIEWER: Use your information from community inventory file and student's immediate neighborhood inventory to assist parents/care providers.

2. After completing the list, note if it is a student or family preference for each activity.

Domestic	S F Pref.	Recreation/Leisure	S F Pref.	School	S F Pref.	Community	S F Pref.	Vocational	S F Pref.

TRCCI; 1992

INITIAL SUMMARY OF BASIC SKILLS AND CRITICAL ACTIVITIES

Student ______________________________ Date ____________________

	PRIORITY 1, 2, 3, 4	HIGH PREFERENCE ACTIVITIES	BASIC SKILLS												
DOMESTIC																
REC/ LEISURE																
SCHOOL																
COMMUNITY																
VOCATIONAL																

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Additional questions to include when interviewing a parent/significant other of a student with dual sensory impairments (Adapted from McInnes & Treffry).

VISION/HEARING INFORMATION

1. What does ________________ do when the light in the room changes? When moving from one area to another with differences in light? How can you tell?

2. What type of lighting seems to be best? Does it vary? How do you know?

3. Does ________________ work better with large objects? Small objects? Does ________________ try to find objects? Which? In what activities?

4. How far away can ________________ recognize familiar people/objects? How can you tell?

5. What does ________________ do when shown photographs? Pictures? Drawings? Changes in color?

6. How does ________________ explore objects/people/new situations?

7. Are there other ways that ________________ moves his/her eyes/head/body to follow lights/objects/persons?

8. Does ________________ use glasses or other special equipment? For all activities? When?

9. Is there any other information that you would like to give on how ________________ uses his/her vision? What have you found that works well?

10. How does ________________ respond to sound? (stops activity, turns head, tenses muscles, etc.) Are there sounds that he/she likes? Dislikes? How do you know?

11. What does ______________ do when sounds in the room change? When moving from one area to another with differences in sound? How can you tell?

12. Does ______________ use hearing aides or other special equipment? For all activities? When?

13. How much sound seems to be best? Does it vary? How do you know?

14. What does __________________ do when hearing familiar sounds?

15. How do you communicate with ______________? By familiar voices? Gestures? Specific signs? Changes in activity?

16. How does _______________ explore objects/people/new situations?

17. Does ______________ turn to sounds? Does ______________ use one side more than another?

18. What kinds of vocal sounds does _________________ make? When?

19. Are there other ways that _________________ moves his/her eyes/head/body to follow sounds? To get information?

20. Is there any other information that you would like to give on how _______________ uses his/her hearing? What have you found that works well?

21. Are there other things that ______________ does that give you information on what ______________ feels, sees, or hears in his/her daily life?

PRIORITIZING CRITICAL ACTIVITIES FOR INSTRUCTION

Student ____________________ Date ____________________

Using the four top-ranking critical activities in each curriculum domain that were deemed important by families, list each activity in the appropriate space below. Rate each question for each activity as follows: 1 = Low, 2 = Medium, 3 = High. Total the ratings for each activity. Rank order activities within each curriculum domain. Higher total ratings will be ranked higher.

	DOMESTIC				RECREATIONAL				VOCATIONAL				SCHOOL				COMMUNITY			
The activity...																				
1. Is a student preference?																				
2. Could be taught using age-appropriate materials and environments?																				
3. Allows the care providers' life to be better or easier?																				
4. Allows the student to become more independent?																				
5. Will occur frequently in a a variety of environments?																				
6. Has a high probability of being used in future environments?																				
7. Expands the number of environments in which the student participates?																				
8. Has a high probability of being acquired given the amount of instructional time and/or with appropriate adaptations?																				
9. Increases interaction with individuals without disabilities?																				
10. Increases participation in environments used by others without disabilities?																				
TOTAL																				
RANK																				

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CURRICULUM BALANCE WORKSHEET
PEERS PROJECT

Consider the following issues in planning with parents during the pre-IEP parent interview to determine the balance given to community based instruction and school integration. Check "school" or "community" to identify where this issue is best addressed.

ISSUE	SCHOOL	COMMUNITY
1. Student ability to generalize		
2. Age of student		
3. Parent/sibling preference		
4. Effect on personal relationships		
5. Student preference		
Ability/willingness of regular ed. staff to work with student		
7. Functional skill needs		
8. Probability of acquisition of curriculum		
9. Prior history of learning		
10. Availability of relevant school/community environments		

Comments:

Draft 1990

Day 4,
Scenarios: Negotiating Curricular Priorities

Bill, the eleven year old student described in the attached material, is making the transition from being 'fully included' in a regular fifth grade classroom to a middle school sixth grade GATE (Gifted and Talented Education) program.

Your team's task is to take on the roles described in your assigned scenario, and to work on discussing and negotiating instructional priorities for Bill for the upcoming year in the sixth grade classroom. Keep in mind the planning tools and procedures presented yesterday and today.

Scenario I

Players:

1, 2. Both parents, who desire full regular education placement and curriculum for their son. They do not want him to be engaged in any community - based instruction. The parents feel that he spent many unproductive years in a special center program prior to moving to the elementary school, and they have said they are "tired of all that functional crap" that was supposedly the main focus then.

3. Sending Special Ed Integration Specialist (itinerant) who does believe that community intensive training in functional skills can be delivered in an integrated manner.

4. Special Ed Administrator who is feeling that this first middle school effort may "make or break" full inclusion in her district.

5. Physical Therapist (or other DIS) who prefers a pull-out model for therapy services.

6. Receiving General Ed Teacher who is very excited about the new program and who operates a highly cooperative learning structure in the GATE class.

7. Advocate for the family.

· Negotiate how the program will be defined for Bill to meet parental priorities and address staff priorities and concerns. (Will there be any activities outside of the general education classroom? How would these be integrated? Are they critical for Bill at this time?)

Scenario II

Players:

1. Sending Special Ed Integration Specialist who has visited the middle school class and has concerns about the instructional model for Bill.

2. Receiving General Ed GATE Teacher who employs a very didactic, lecture style model with minimal cooperative learning or participatory activity. She has serious doubts about the student's coming to her class, but is aware of the school's and district's commitment to serving all students in general education.

3. Sending General Education Teacher who hates to see Bill leave. He has really endorsed and supported the inclusion model, as evidenced by Bill's success in his class.

4. Special Education Administrator who has some concerns about inclusion at the secondary level particularly in terms. Of the student's perceived needs for vocational instruction on and off campus, related community and domestic functional skills, etc. (How will these be addressed?)

5. Receiving School Site Principal who is not really comfortable with all of this, but open to hearing and learning more. She believes strongly in team work and consultative-collaborative models. She's hoping that this student's entry into GATE may have an effect on the receiving teacher's strategies and curriculum for all kids.

6, 7. Parents who are very excited about this step, and feel very positive about the school. Negotiate priorities considering what will be useful to the student as far as his IEP goals within this didactic classroom model. Will general curriculum be adapted? Will other materials/activities/objectives be substituted? Can general ed model be changed in this case?

Scenario III

Players:

1, 2. Parents are going along with full inclusion at the middle school level, but have some serious doubts and concerns about safety, cruelty to their son; as well as about how we will receive vocational instruction and other functional emphases.

3. Sending Integration Specialist/Teacher who has a very positive relationship with the parents, and who initiated the transition process to the middle school.

4. Receiving Integration Specialist (Sped teacher) who is new to this position. She has had an integrated SDC at middle school level in the past.

5. Receiving General Ed Teacher who feels strongly that any student he serves should be there 100% of the time (no pull out), and who is sure the hands-on approach he uses will be meaningful for Bill.

6. Special Ed Administrator who is brand new to the area, but generally supportive of integration.

7. Receiving General Ed Principal who has specific concerns about how and when teachers will plan together for the eight students with severe disabilities who will be included in eight classes this Fall.

DAY 4 CURRICULAR PRIORITIES

STUDENT PROFILE #1

Bill is an 11 year old with Down syndrome who has been labelled as having moderate mental retardation. He had always attended special education classes in a center until last year, when he was enrolled in a regular fifth grade class, with special education support, at his local school of residence. Bill is able to communicate verbally, but is often difficult for others to understand. He has a limited sight word vocabulary, and can readily identify picture symbols. His sight vocabulary has increased this year, and he is able to identify many signs/words in the context of his everyday/frequented environments. Bill enjoys recess and P.E. activities. Once he is assisted or familiarized with the rules and expectations of a game, he is a willing and active participant. It is easier for him to participate and attend to rules when activities are more structured.

Due in part to his occasional difficulty in communicating his intentions or frustrations, (and, perhaps, due to his competitive spirit!), Bill has left his group during recess and P.E. a few times, and has twice left the classroom without permission. These instances occurred mostly when he was new to the class and school, and diminished as time went on. He went only to the edge of the school grounds, never off campus. When brought back, he was required each time to go to the principal's office, where his mother was called. These consequences were applicable to all students at the school. Since they were clearly understandable by Bill (and undesirable as well!), the strategy proved to be effective.

Bill is beginning to use a calculator, which he finds very motivating. He is learning to verbally match numbers, and can visually match them. He enjoys immensely using computers for math, sight word activities or games. Bill also loves to participate in group activities and to be the center of attention. He eagerly volunteers to assist the teacher, raises his hand to contribute to discussions or answer questions, will go to the front for opening pledge and oral reports, etc. Overall, if Bill realizes the importance and value of a request or activity, i.e. its meaningfulness and relevance for him, he will apply himself and participate fully. Typically, when faced with more "arbitrary" rules or requests, he may refuse, engage in less desirable actions, or simply not apply himself.

Bill likes to joke around with his friends, but sometimes doesn't know when to stop. However, when dealt with fairly, under the rules that apply to all, he will do his best to follow suit.

In sum, Bill's favorite activities include: eating out, playing board games, using the computers, watching videos, looking at books or magazines, playing kickball and 4-square, drawing, and participating in science activities and experiments.

BILL'S IEP GOALS

SCHOOL INTEGRATION & ACADEMICS

These goals and objectives are to be implemented within the context of the regular sixth grade classroom.

1. Write his full name and numbers; to include personal information, relevant sight words and numbers.

2. Verbally identify and visually match functional sight words in context and on paper to include names of friends and teachers, and signs/words relevant to regularly frequented environments and activities.

3. Verbally identify and visually match picture symbols and sight words in use on a daily and monthly schedule, and with materials adapted for use in specific instructional environments, (i.e. job checklist, shopping list, restaurant, menu, school menu, etc.)

4. Identify and count numbers 1-10 and use a calculator and computer to add three prices (i.e. dollars, decimals, & cents) with adaptations to be specified.

DOMESTIC & PERSONAL SAFETY

5. Keep desk clean by wiping top with sponge and cleaner, straighten up contents, and throw away trash a minimum of twice a week.

6. Use the appropriate school restrooms at the appropriate times within the designated time period.

7. Use a push button phone to call his home, school and parents' work numbers on a private and pubic pay phone using an adapted address/emergency number card/notebook.

8. Locate and carry his home/school identification card in a wallet/backpack whenever leaving school grounds.

9. Dress and undress for P.E. using a locker in the boys' locker room with in the designated time period.

COMMUNITY

10. Eat lunch in a fast food restaurant (i.e. order, pay, eat and clean up) with 1 or 2 nondisabled classmates once a week.

11. Purchase 3-5 items for home at the Vons Supermaket using a picture list and a predetermined amount of money once a week.

12. Walk with his companions, stopping at each curb, alleyway and driveway and stating when it is safe to cross.

RECREATION/LEISURE

13. Participate in regular education sixth grade P.E. classes with support from classmates and varsity sport "tutor".

14. Use the school library with classmates when scheduled to check out a book, look at magazines and participate in class activities

15. Participate in the rotating Exploratory Wheel classes consistent with his classmates given peer and instructional support.

16. Participate in the band (instrument to be determined)

17. Participate in all field trips, assemblies and school events with his 6th grade classmates.

VOCATIONAL

18. Perform designated classroom jobs and responsibilities consistent with the class requirements given peer and instructional support as needed (to be specified).

19. Perform a school based job (to be identified and specified) with peer and instructional support a minimum of 3 hours per week.

Sixth Grade Class schedule

7:30	Current Events Opening Announcements
8:00	Reading
9:00	Spelling
9:15	Social Studies/Language
10:10	Break (6th grade) (use restrooms, water fountains etc.)
10:15	Exploratory Wheel (1st 6 weeks - ART)
11:05	Lunch
11:45	Study Hall
12:15	Math
1:15	P.E.
2:15	Dismissal

Developed by D. Tweit, 1990.

DAY 4: CURRICULUM BALANCE

STUDENT PROFILE #2

Jenny is a seven year old student who has been labeled as severely mentally retarded and multi-handicapped. She uses a wheelchair and has limited use of her arms and legs. Daily physical therapy and proper positioning are important for her. Jenny communicates with smiles and laughter, with eye gaze and head movement, and by moving her right arm slightly towards pictures presented to her. She indicates choice of one picture when two are presented to her. Using this method she is consistently successful in making choices of food or drink, music or story activities, and inside or outside free time. Jenny needs assistance with toileting. She also needs assistance eating--her food must be blended and eating takes a long time. She chokes easily. She has a seizure disorder not completely controlled by medication. She has a grand mal seizure about once a week. The seizures last about a minute, Jenny sleeps for ten or fifteen minutes after her seizures, and then she returns to normal activity. Jenny uses her eyes very effectively. She is alert to all that goes on in the classroom and closely follows any activity within the range of her vision.

Periodically, once or twice a day, Jenny will cry loudly for ten or fifteen minutes at a time. No one has figured out what motivates Jenny's crying, although staff have tried to use ignoring her crying as a method of reducing these incidents. The strategy has been ineffective.

From age 3, Jenny attended self-contained classes for students with severe disabilities on a general education elementary site where several of these classes are clustered. At the age of six she was placed full time in a general education first grade class at the same site. She has had a very successful year with an enthusiastic caring teacher, with support from knowledgeable and willing special education staff, and with natural peer supports. It is time for her to move on to the next grade.

Jenny has recently shown improvement in her ability to grasp objects. She seems to become excited and happy when her classmates are working with paints or crayons. She frequently reaches out to those materials even though she has difficulty controlling them. She has also shown interest in computer activities when she is paired with a peer. She attends well to the screen and reaches toward the keyboard at appropriate times. Jenny loves large group activities. She is attentive and quiet whenever her first grade classmates are participating together in an activity.

JENNY'S IEP GOALS

Community Based Instruction:

1. Participate in the school library routine for checking out an appropriate book.
2. Work independently on a computer activity in the school computer lab, supported by appropriate technology.
3. Communicate choice of a drink to fast food restaurant staff, with peer support.

Domestic Skills and Personal Safety:

1. Improve ability to eat, with support from occupational therapist.
2. Participate in cleanup after lunch at cafeteria table, with support from peers.
3. Wear an identification bracelet and point to it when asked in a variety of ways for identifying informatiom.

Recreation/Leisure Skills:

1. Participate in class soccer game with wheelchair adaptation to push the ball and with appropriate teammate support.
2. Participate in second grade "cheering section" during primary school "Olympic" games in the spring.
3. Select one of four quiet time activities (music, reading, card game, or art activity) and indicate that choice to a peer.
4. Participate in the game "Go Fish" with peer support.

Pre-vocational Skills:

1. Activate a switch to operate a variety of audio-visual equipment (TV/VCR, record player, tape player...) during appropriate class activities.
2. Grasp a paint brush and hold it for thirty seconds while participating in a class art activity.

Infused Academics and Communication Skills:

1. Grasp a name stamp and hold it while being assisted by a peer to stamp papers at appropriate times throughout the class day.
2. Indicate to a peer that the peer has correctly understood choice Jenny has made.
3. Indicate desire for assistance by hitting a bell on wheelchair.

DAY 4 HO

SECOND GRADE CLASS SCHEDULE

8:30	Opening Flag salute, attendance, calendar
8:50	Language arts
9:45	Recess/snack
10:00	"Show and Tell"
10:15	Math
10:50	Art, music, P.E.
11:30	Lunch,recess
12:15	Story, listening skills
12:35	Language journal
12:55	Social studies
1:25	Recess
1:40	Health, science
2:15	Dismissal

DAY 4 CURRICULUM BALANCE SCENARIOS

Jenny, the student described in the attached material, is making the transition from grade one to grade two as a fully included student in general education classrooms.

Your team's task is to take on the roles described in your assigned scenario, and to work on discussing and negotiating priorities for Jenny for the upcoming year in the second grade classroom.

Scenario 1:

The Players:

1. Parent--is very excited and pleased that Jenny is receiving services with her peers and has seen noticeable growth in Jenny's abilities especially over the last six months. Parent is very concerned that Jenny make friends who will interact with her in a natural way outside the school environment. Parent values most highly Jenny's social relationships and lasting network of friends.

2. Special Education Support Teacher--enthusiastically supports full inclusion. Recognizes the value of relationships and the necessity to educate for interdependence. Concerned that Jenny's program be functional for her. Sees the school as the community for a child of seven years of age, and is reluctant to take the student off site for any instruction.

3. Sending General Education Teacher--overcame initial reluctance to have Jenny in her class, and is now an enthusiastic supporter of fully inclusive schooling. Has many stories to tell of how peers all supported Jenny throughout the last school year. Needed much support from the special education teacher and the speech and language specialist to adapt curriculum. Very receptive to offsite community instruction and advocated for including typical classmates during such instruction so they could work on certain skills in the community. Certain that Jenny has great potential and ability to progress academically if a way is found to help her

communicate more.

4. Receiving General Education Teacher--very uncertain of the program and very reluctant to have Jenny in class. Has no clear picture of what Jenny will do in class. Does not believe that curriculum can be effectively adapted. Feels that Jenny can only fail in the general education environment and that she will be much safer, happier, and better instructed in special education rooms designed for "those kids."

5. CCS Representative--understands full inclusion and is philosophically committed to it, but is worried. Has struggled all year to assist in providing integrated therapy on a collaborative basis, but has not quite "got it". At this point is very cautious.

6. Principal--is retiring this year. Has supported teacher efforts this year but has personally stayed uninvolved. Says teachers are the experts.

Scenario 2:

The Players:

1. Parents--are pleased with the placement of Jenny in general education. Are worried about her therapy needs and want to see more integrated therapy.

2. Special Education Support Teacher--believes that friendships and social relationships are all important during the elementary school years. Believes that community based instruction should not begin before middle school, and that there is no need to worry about functional curriculum until middle school.

3. Sending General Education Teacher--very committed to Jenny's education in the general ed classroom. Believes strongly that academics must be stressed for Jenny so that she in fact fulfills her full potential. Believes that it is too early to be concerned about community based instruction and that functional domestic

skills should be addressed at home.

4. Receiving General Education Teacher--has no experience of full inclusion, but has read the literature extensively and is firmly committed. Wants integrated therapy, a functional approach to Jenny's program, community based instruction involving typical peers, academic challenges for Jenny, and firmly established circles of friends for Jenny.

5. CCS Representative--cannot envision integrated therapy. Firmly committed to pullout model for physical therapy based on limited resources and need for equipment.

6. Principal--is a real visionary. Has taken a strong leadership role in Jenny's program, believing that full inclusion is "the right thing to do". Wants it to work.

Scenario 3:

The Players:

1. Parents--did not initiate full inclusion for Jenny. Wanted her "integrated" but never believed that full inclusion was a possibility for her. Has been very excited and happy about her progress this year in terms of ability and happiness at school. Sees a "whole new world" opening up for their daughter. Have left curriculum decisions pretty much up to the scool.

2. Special Education Support Teacher--supports full inclusion but believes in a strong community based functional curriculum for students even at the youngest ages. Believes students should spend a major portion of their school time in their neighborhood community environments.

3. Sending General Education Teacher--believes that Jenny needs to be more a part of the class. Believes that pulling Jenny out of class for community based instruction or for therapy seriously interferes with her "belonging" as a member of the class community. Wants more time with Jenny in class to test

academic ability and to work on social skills.

4. Receiving General Education Teacher--ready and willing to have Jenny, but overwhelmed and very dependent on support. Plans to rely on the "experts" to make this work.

5. CCS Representative--has a clear understanding of and experience in integrated therapy. Knows how to deliver services using a collaborative approach.

6. Principal--believes that full inclusion is inevitable. Has a background in special education. Was on a committee that wrote a functional skills curriculum. Is ineffective in providing support in light of very limited resources.

Negotiate Jenny's program priorities, acknowledging parent input, the need for functional skills and therapy, the different ways to define community, the need for friendships, and the necsessity for academic challenges.

FOUR CORNERS
ANALYZING GROUPING STRATEGIES

Please move to an assigned corner:

(1) Ability Groups
(2) Skill Based Groups
(3) Cooperative Groups
(4) Multi-Dimensional Performance Groups

Identify a time keeper, facilitator, recorder, and reporter for your group.

Take 5 minutes to read your assigned grouping strategy.

Take 15 minutes as a group to develop an argument which promotes your grouping strategy over the other three strategies as the one which is most effective and best supports full inclusion. Use personal experience and examples to enhance your argument. You will have 3 minutes to debate in favor of your strategy against the other three groups.

Roger, B.; Gorevin, R.; Fellows, M. & Kelly, D. (1991). Schools Are For All Kids: Level II-School Site Implementation Training. San Francisco, CA: California Research Institute.

EXERCISE

ANALYZING THE RESEARCH ON GROUPING STRATEGIES

DAY 4 HO

	BENEFITS	LIMITATIONS
ABILITY GROUPS		
SKILL-BASED GROUPS		
COOPERATIVE GROUPS		
MULTI-DIMENSIONAL PERFORMANCE GROUPS		

READING #1

Analyzing the Research on Grouping Strategies.

Jigsaw Material: MULTIDIMENSIONAL PERFORMANCE GROUPING

What Is It?

Many teachers and researchers have raised serious questions about placing students in homogeneous ability groups. They fear that students in the low-ability groups may tend to be less attentive, may be presented with less demanding tasks, and may develop lower self-images than students in high-ability groups. To counteract some of these effects, principals and teachers have made conscious efforts to place students in groups which are based on other dimensions besides ability (e.g. students' skill competencies and interests) or to have students involved in a variety of groupings across the school day. Grouping students in these ways acknowledges that people are multi-faceted and have strengths and weaknesses in different areas. Because of the variety of criteria used for grouping, these arrangements are referred to as multidimensional performance groupings.

How Is It Used?

There are several strategies that have been used which highlight this multidimensional performance perspective. For example, Bossert (1979) has found some teachers use multitask activitiy structures where different groups of students in a classroom perform different tasks. Group formation is based on students' interests or hobbies; students are allowed to change groups as their interests shift. In such a grouping structure, students of varying academic ability levels are involved in the same group. In addition, Rosenholtz (1980) has designed a Multiple Abilities Curriculum which stresses that different students have strengths in different curricular areas. Someone who is good in math may not excel in social studies. This curriculum and its resultant grouping structure emphasize to students and teachers that all students are capable, not just the high-ability readers.

Another way to introduce multidimensional performance standards is by considering the different instructional groupings that students are exposed to throughout the school day. A case study conducted by the Far West laboratory of a school using multiple instructional groupings describes one way that various groups can be used (Barnett et al., 1982). For reading skills, students are placed in different skill competency groups each week based on student need. For example, students may spend the entire week working on suffixes. Any reading skill group can be composed of high-, middle-,. and low-ability readers. However, for regular reading and math, students change to groups which are based on ability. In these groups, students work from a uniform textbook series including workbooks. For the remainder of the school day, students attend their homeroom classes which are composed of students at the same grade level. In this arrangement, students are not placed in these groups based on any single dimension, but on a variety of dimensions ranging from their reading skill competencies, to their reading abilities, to their math abilities, to their ages or grade levels.

Jigsaw Material: MULTIDIMENSIONAL PERFORMANCE GROUPING (cont'd)

What Are the Advantages?

While there is not a great deal of evidence regarding the effects of multidimensional performance groupings on student achievement, there are indications of other positive consequences for students. In classrooms where teachers use multitask activity structures, Bossert (1979) discovered that students were less competitive and tended not to form friendships along ability lines as was the case in recitation oriented classrooms. Another benefit is that students can begin to observe the capabilities of other students whom they would not get to interact with if they were places in ability-based groups. In a multidimensional structure, students have more varied views of each others' abilities. There is less agreement on a single status hierarchy (Rosenholtz and Wilson, 1980). And low-ability students may be able to maintain a more positive self-image. For instance, in the Far West Case Study low-ability readers had self-perceptions of their reading ability that matched high-ability readers, unlike the general trend toward lower self-esteem. Thus multidimensional performance groupings appear to have a number of social benefits.

References

Barnett, B.G., Filby, N.N. and Bossert, S.T. Multiple instructional groups: A case study of an entire school. San Francisco: Far West Laboratory for Educational Research and Development, 1982.

Bossert, S.T. Task and social relationships in classrooms. Cambridge: Cambridge University Press, 1979.

Rosenholtz, S. Treating problems of academic status. In J. Berger and M. Zelditch (Eds.), Studies in expectation states theory: Pure and applies. San Francisco: Jossey Bass, in press.

Rosenholtz, S. J. and Wilson, B. The effects of classroom structure on shared perceptions of ability. American Educational Research Journal, 1980, 17, 175-182.

Material courtesy of the Far West Laboratory for Educational Research and Development, Instructional Management Program.

READING #2

Analyzing the Research on Grouping Strategies.

Jigsaw Material: COOPERATIVE GROUPING

While research on cooperation goes back to the early 1900s research on practical classroom applications of cooperative principles began in the 1970s, when several independent groups of researchers developed cooperative instructional methods. All of the methods involve having the teacher assign students to two-to-six-member learning groups in which there are high, average, and low achieving students. These groups typically have boys and girls, and members of different ethnic groups in approximately the same proportion as they are represented in the whole class. In almost every other respect the methods differ markedly from each other.

- Student Teams-Achievement Division (STAD) - Students assemble in teams of four or five members to master worksheets on material covered in a lesson just presented by the teacher. Subsequently, they individually take a quiz on that material. The team's overall score is determined by the extent to which each student improved over his or her past performance. The team demonstrating the greatest improvement is recognized in a weekly class newsletter.

- Teams-Games-Tournament (TGT) -- The procedure in TGT is the same as that used in STAD, but instead of taking quizzes, the students play academic games with other members in the class whose past performance was similar to their own. The team score is also based on indicidual improvement.

- Jigsaw -- Students meet in three to six-member-teams. The teacher gives each student an item of information which the student must "teach" to the team. Students are then individually tested for their mastery of the material. Jigsaw II is the same, except that students obtain their information from textbooks, narrative mateial, short stories, or biographies. The class is then quizzed for individual and team scores.

- Learning Together -- Students work together in small groups to complete an academic task. Each group member is assigned a different role. The team as a whole receives recognition and praise for mastering the academic content and for working cooperatively.

- Group Investigation -- This is a more complex method, requiring students to accept greater responsibility for deciding what they will learn, how they will organize themselves to master the material, and how they will communicate what they have learned to their classmates.

These methods share four positive characteristics. (1) The cooperation required among students prevents one student from doing most of the work for the others. (2) In spite of the cooperative nature of the groups, each student must learn the material in order to improve his or her own score and team score (3) Even low achievers who may not contribute greatly can receive recognition since scores are based on individual improvement, however small, over past performance. (4) Students are motivated to cooperate since they receive not just a grade on a piece of paper, but public recognition from the teacher and the class.

Jigsaw Material: COOPERATIVE GROUPING (cont'd)

Cooperative groupings have positive effects in several areas. They contribute significantly to student achievement -- to an equal extent in both elementary and secondary schools; in urban, suburban, and rural schools; and in diverse subject matter areas.

Robert Slavin looked at twenty-seven studies investigating the effects of cooperative learning programs on student learning. A significant positive effect on student achievement was found in 19 of these studies, no differences in seven, and in one study there was a significant difference favoring the control group. According to Slavin's synthesis of the research, the most successful method for improving student achievement appears to be Student Team Learning.

Johnson and Johnson conducted a meta-analysis of 122 research studies on the relative effects of cooperative, competitive, and individualistic efforts on achievement and productivity. The results of their study indicate that cooperative grouping tends to promote higher achievement than do competitive and individualistic learning experiences. These results hold for all age levels, for all subject areas, and for tasks involving concept attainment, verbal problem solving, retention and memory, motor performance, and guessing-judging-predicting. For rote decoding and correcting tasks, cooperation seems to be equally effective as competitive and individualistic learning procedures.

Some other research findings are:

- Cooperative grouping promotes more liking among students. This is true regardless of differences in ability level, sex, handicapping conditions, ethnic membership, social class differences, or task orientations (Johnson and Johnson, 1983, 1986; Johnson and Johnson, and Maruyama, 1983).
- Cooperative grouping promotes more positive attitues towards both the subject area and the instructional experience, as well as more continuing motivation to learn more about the subject area being studied (Johnson and Johnson, 1983, 1986).
- Students participating in cooperative groups like the teacher better and perceive the teacher as being more supportive and accepting academically and personally (Johnson and Johnson, 1983).
- Cooperative grouping promotes higher levels of self-esteem (Johnson and Johnson, 1983)

READING #3

Analyzing the Research on Grouping Strategies

Jigsaw Material: ABILITY GROUPING

Students are grouped for instruction by abilitiy, in one way or another, in almost every school. But hundreds of research studies have produced few clear conclusions about how grouping affects student academic achievement.

In theory, it makes a lot of sense to put high achieving students together for instruction. The teacher can teach at a higher level and move through the material faster, and high achievers will be motivated by competing with one another.

It also seems to make sense, at least in theory, to put low-achieving students together for instruction. The teacher can teach at a level appropriate to student needs and move through the materials more slowly, and the low achievers will benefit from not having to compete with the high achievers.

On the other hand, grouping high achievers deprives them of interaction with low achievers, which they'll have to do in the real world. Grouping low achievers labels them, setting up low expectations that may be self-fulfilling; deprives them of the example and stimulation provided by high achievers; and often results in their getting lower quality instruction.

Perhaps most important, ability grouping goes against our democratic educational philosophy by creating academic elites.

How Does Grouping Affect Student Achievement ?

The most common methods of ability grouping are "between-class" and "within-class."

Between-class ability grouping refers to the school-level practice of forming classrooms that contain similar-ability students. Within-class ability grouping refers to the teacher-level practice of forming groups of similar-ability students within an individual classroom.

Many other grouping practices vary and combine these two methods.

Center researcher Robert Slavin has reviewed the best evidence about achievement effects of five comprehensive abilitiy-grouping plans used in elementary schools -- ability-grouped class assignment, regrouping for reading and/or mathematics, the Joplin plan, non-graded plans, and within-class ability grouping. The following describes each ot these plans and the conclusions about their effectiveness.

Ability Grouped Class Assignment. This plan -- the pure form of between-class grouping -- assigns students homogeneously by ability or achievement to one self-contained class. In some departmentalized upper elementary grades and in middle schools, the class may move as a whole from teacher to teacher.

The research review clearly indicates that ability grouped class assignment does not enhance student achievement in the elementary school.

Regrouping for Reading and Mathematics. This plan assigns students to heterogeneous homeroom classes for most of the day, but regroups them according to achievement level for one or more subjects (usually reading or mathematics).

For example, all students at a particular grade level would have reading scheduled at the same time, and would be resorted into ability-grouped classes for reading instruction.

Slavin's review finds some evidence that regrouping for reading and mathematics within grade level can improve student achievement -- but the level and pace of instruction must be adapted to the achievement level and students must not be regrouped for more than one or two subjects.

Jigsaw Material: ABILITIY GROUPING (cont'd)

Joplin Plan. This plan assigns students to heterogeneous classes most of the day but regroups them for reading across grade levels. For example, a reading class at the fifth grade, first semester reading level might include high achieving fourth-graders, average achieving fifth-graders, and low achieving sixth-graders.

The research review finds consistent evidence that the Joplin Plan increases student reading achievement.

Nongraded Plans. This term refers to a variety of related grouping plans which place students in flexible groups based on their performance, not their age. Thus grade-level designations are removed. The curriculum for each subject is divided into levels through which students progress at their own rate.

The research review finds less convincing evidence for nongraded plans in general than for the Joplin Plan, but the evidence is still positive. Well-controlled studies conducted in regular schools generally support the use of comprehensive nongraded plans.

Within-Class Ability Grouping. The most common form of this grouping is in reading, where teachers assign students within their classroom to one of a small number of groups (usually three) on the basis of their ability level. These groups work on different materials at rates unique to their needs and abilities.

Similiar methods may also be used in mathematics, where two or more math groups may work within the classroom at different levels and rates.

Slavin's review finds, surprisingly, that too few rigorous research studies have been conducted of the use of within-class ability grouping in reading to either support or disclaim its effectiveness. The practice is so widespread in reading that it is difficult to conduct research that includes a control group not using within class ability grouping.

Research clearly supports the use of within-class ability grouping in mathematics, especially if only two or three groups are formed. The positive effects are slightly greater for low-achieving students than for average or high Achievers.

Research into Practice. Schools and teachers, the review concludes, should use the grouping methods that the research finds to be effective (within-class ability grouping in mathematics, class regrouping plans such as Joplin and non-graded in reading).

Schools should find alternatives to the use of ability-grouped class assignment – assigning students to self-contained classes according to general ability or performance level.

The review derived several general principles for making ability grouping an effective practice in classrooms and schools. Effective ability-grouping plans, in general, contain the following elements:

1. Students should remain in hetergeneous classes at most times, and be regrouped by ability only in subjects in which reducing heterogeneity is particularly important (for example, math and reading). Students should identify primarily with a heterogeneous class.
2. Grouping plans must reduce student heterogenity in the specific skill being taught, not just in IQ or overall achievement level.
3. Grouping plans must reassess student placements frequently and allow for easy reassignments based on student progress.
4. Teachers must vary their level and pace of instruction according to student levels of readiness and learning rates in regrouped classes.
5. Only a small number of groups should be formed in within-class ability grouping, so the teacher can provide adequate direct instruction for each group.

Reference

Slavin, Robert E. "Ability Grouping and Student Achievement in Elementary School" A Best-Evidence Synthesis." Center for Research on Elementary and Middle Schools, Report No. 1, June 1986.

Material adapted from The CREMS REPORT., Center for Research on Elementary and Middle Schools, Johns Hopkin's University, June 1986.

READING #4

Analyzing the Research on Grouping Strageies

Jigsaw Material: SKILL-BASED GROUPING

What Is It? Students are assigned to groups based on their performance in specific skill areas. Usually these are small groups of students who have deficiencies in some specific skill area within reading or math. Because of the specific skill identifications, groups often meet for a short time and regrouping of students occurs frequently.

How Is it Used? A variety of ways of implementing skill-based groups have been developed. For example, many individual teachers use skill grouping within their classrooms as they proceed through the curriculum. Some reading textbooks contain a series of skill tests that students take throughout the year to determine their knowledge of certain skills. Those students who fail a particular skill are then grouped to receive instruction on that skill while the other students do another activity. The next skill is not presented until all the students have mastered the preceding skill.

In addition, schools have developed their own programs where specific skills are covered in certain grades. Students are tested at the beginning of the school year and their deficiencies are noted. Therefore, in any one classroom, there may be clusters of students who have not mastered certain skill. Teachers can routinely divide students into their necessary groups to provide the relevant instruction. As students in each group are able to demonstrate mastery of the skill, they can move on to another skill. Thus, students can move at different paces through the skills and the entire class is not held up until all students pass a certain still.

Finally, research conducted by the Far West Laboratory investigated another form of skill grouping for reading (Barnett and Filby, 1984). In this arrangement, fourth, fifth, and sixth graders are tested at the beginning of the year to determine the reading skills they need to master. These skills range from identifying vowel sounds to working with a card catalog from the library. Students are placed in a skill group and receive a week of instruction. Students of varying reading abilities constitute each of the groups. If students can pass the mastery test at the end of the week, they move on to their next scheduled skill the following week. Should they be unable to pass the skill, they receive another week of instruction. Groups shift at the same time, but students can still move at their own pace. To facilitate the constant shifting of students, a computer managed system is used to separate students into their next groups and to provide information about the skills that have been, and still need to be, mastered. Materials available for each skill are also catalogued.

Jigsaw Material: SKILL-BASED GROUPING (cont'd)

What Are the Advantages and Disadvantages?

Many teachers who used skill-based programs indicate a preference for the program because the skills are clarified and they know exactly what they are to teach. Moreover, teachers find this breakdown useful when talking to parents since they can show parents exactly those areas that their children have mastered and have yet to master.

Skill-based groupings can provide certain problems as well. Having students of different ability levels in the same skill group could create a need for materials differentiation within the group. In the Far West Study, however, teachers generally used the same materials for all students and students from different ability levels were equally successful in completing class work. The Far West Study also indicated that low-ability students were unable to pass weekly mastery tests at the same rate as high-ability students even though they were able to do the work just as well during the week. Moreover, at the end of the year, low-ability students retained far less of the materials they had been exposed to than high-ability students, a finding which seriously questions whether mastery of certain skills had actually occured. However, year-end retention rates were positively affected by the amount of time students spent studying skills. For example, when students took more than one week to master certain word structure and work meaning skills, they were better able to retain these skills at the end of the year. These findings point out the need to understand how skill mastery is attained and retained by students of different ability levels. They also indicate the need to include review and practice components in a skill-based program.

Many teachers complain that testing students, setting up groups, and retesting students is time consuming. They feel that they spend too much of their time documenting students' skills rather than teaching skills. While this is a common dilemma, some schools have taken steps to free their teachers to do more teaching. For example, some programs have been able to hire program specialists who are responsible for doing all the pre-testing and monitoring of materials. In addition, the use of the computer as a mangement tool has taken the burden of determining groups off teachers. In short, the problems teachers associate with the mangement of skill-based programs seem to be reduced when there are support mechanisms in place to assist in the documentation and arrangement of groups.

References

Barnett, B. and Filby, N. Skill grouping for reading. San Francisco: Far West Laboratory for Educational Research and Development, 1984.

Material Courtesy of the Far West Laboratory for Educational Research and Develpment, Instructional Management Program.

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Summary Activity
GROUPING STRATEGIES
At Your School Site

1. Number the grouping strategies from 1 to 4. Of the four grouping strategies discussed here which are currently used most in your school. Place a number by each strategy (1) being the strategy used most often (4) least often.

___ Ability Groups
___ Skill-Based Groups
___ Cooperative Groups
___ Multi-Dimensional Performance Groups

2. Of the four grouping strategies which would you like to see emphasized at your school site to enhance success in the movement towards full inclusion. Now number the grouping strategies in order of your preference. 1 being the strategy you would like to be used most often in your school.

___ Ability Groups
___ Skill-Based Groups
___ Cooperative Groups
___ Multi-Dimensional Performance Groups

3. Compare your ratings with your group. If there is discrepancy between ratings for number 1 and number 2 identify one goal this group would like to accomplish to decrease the discrepancy.

BENEFITS & OUTCOMES OF COOPERATIVE LEARNING

SOCIAL SKILLS ACQUISITION

RAISE SELF-ESTEEM

MORE ON-TASK BEHAVIOR

ALL HAVE A ROLE; ALL SEEN AS COMPETENT

ACADEMIC LEARNING MAINTAINS MORE

FOSTERS INTERDEPENDENCE

FOSTERS HELPING/SHARING INTERACTIONS

EXCITING LEARNING ENVIRONMENT

CRITICAL TO POSITIVE INTEGRATION OUTCOMES

IMPLEMENTING COOPERATIVE LEARNING EXAMPLES

1. Small Group Learning (Johnson & Johnson)
   - Heterogeneous Groups
   - Group Investigation Model

   Mexico: Each group takes a different aspect-food, geography, music, political system. The included student participates in the food group, focused on planning menu, shopping and preparing food with others in the group.

2. Jigsaw (Slavin)
   - As in this session- home and expert groups

   *Each responsible to master sections and share with the home group

   *Pizza example: (3rrd grade) Green pepper experts, sauce experts, cheese experts, crust experts,, etc. Learn about ingredient, nutritional value, preparation. Teach others in home group, assemble, prepare and eat pizza.

   *Play: Each group does sections. Expert groups each learn one character together. Bring back to home group.

   *Vocabulary: Experts learn 4 of 20 words. Return and teach home group.

3. Cooperative Games (Sapon-Shevin)
   Restructure competitive games, e.g. Musical Chairs or create cooperative ones. Recreational and/or instructional.

*Who am I?	Yes/No questions. Turn taking-1 each. States, animals etc. "Do I border on another country?"
*Sequences	1) Wear cards with historical events. Put selves in chronological order when you can't see your own event name. 2) Alphabetize state names on selves, 3) Order story picture or narrative cards.
*Concentration	Wear signs-find partner through questions, e.g. South Dakota/Pierre.

PEERS
DAY 4

CREATING A COOPERATIVE CLASSROOM ENVIRONMENT

ELIMINATE COMPETITIVE CLASSROOM SYMBOLS

USE INCLUSIVE LANGUAGE

BUILD THE CLASSROOM COMMUNITY

ENCOURAGE INTERDEPENDENCE, USE OF EACH OTHER AS RESOURCES

ENCOURAGE RECOGNITION OF EACH OTHER'S ACCOMPLISHMENTS

USE LITERATURE TO TEACH COOPERATION

FROM SAPON-SHEVIN, M. (1990)
IN STAINBACK & STAINBACK (EDS)
SUPPORT NETWORKS.

ESSENTIALS OF COOPERATIVE LEARNING

1. Heterogeneous Groups.

   Groups are heterogeneous in ability and personality. Groups can be from 2-6 in size.

2. Team Building.

   The amount, type and timing of team building depends on the learning task and personality of the students involved. If there is tension in the classroom by cliques, or if there is a wide discrepancy among the achievement levels of students, then team building needs to be done before complex Cooperative Learning activities are scheduled.

3. Positive Interdependence. (We sink or swim together)

   Cooperative learning activities are based on positive interdependence where goals are structured so the students need to be concerned about the performance of ALL group members.

4. Individual Accountability.

   Every student is given feedback on his or her progress usually through quizzes or tests and the group is given feedback on how each member is progressing so help can be given accordingly.

5. Direct teaching of Social Skills. (Collaborative Skills)

   Students are taught and practice those specific behaviors which will help the group complete the task and LIKE each other when the task is over. These skills are called TASK and MAINTENANCE behaviors.

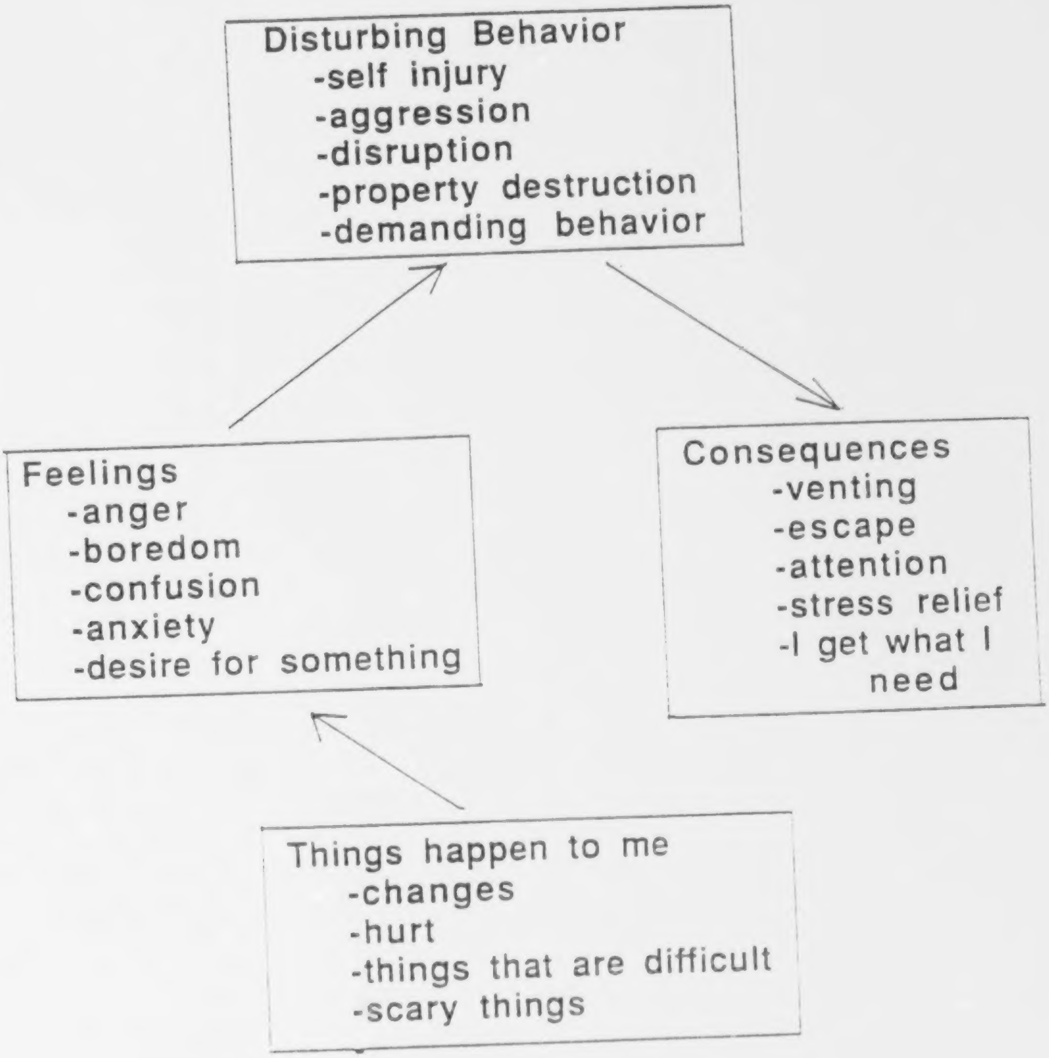
6. Group Process. (Small group and total class)

   The teacher structures procedures for the group to discuss how effectively they are working together using the social skills and how they could use them more appropriately. This is the key to improving groups who are not working collaboratively together as well as rewarding those who are.

THE QUICK WEIGHT LOSS APPROACH TO BEHAVIOR CHANGE.

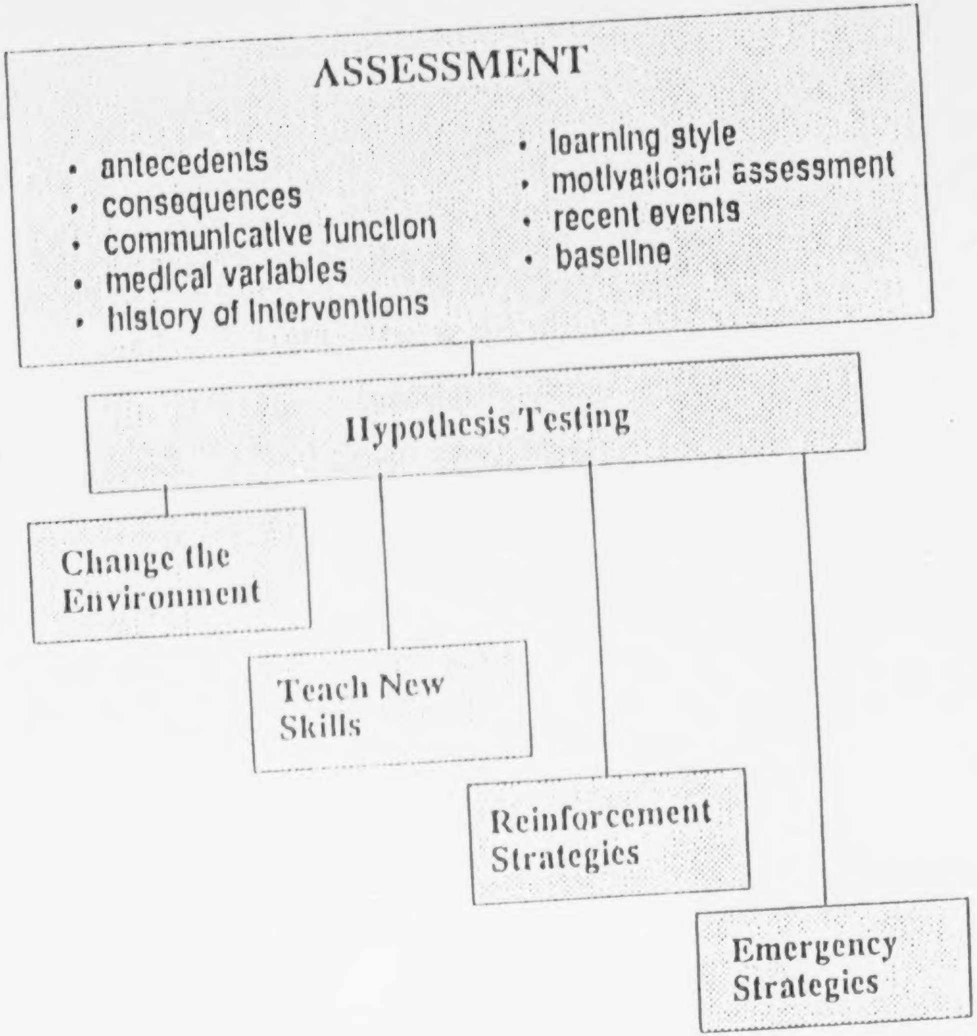
"To ask BD students to relinquish their inappropriate tools for survival, regardless of how uneconomical, how unhappy, how inappropriate and self-defeating they may be, because we ask them to do so, is an absurd simplification of human processes. To any self-respecting BD child, relinquishing these tools seems stupid, blind, and consequently enraging or ridiculous just as if we were to ask a man to jump from a plane using a parachute with a broken shroud."

Newman (1961)


Disturbing Behavior
-self injury
-aggression
-disruption
-property destruction
-demanding behavior
Consequences
-venting
-escape
-attention
-stress relief
-I get what I need
Feelings
-anger
-boredom
-confusion
-anxiety
-desire for something
Things happen to me
-changes
-hurt
-things that are difficult
-scary things

CHALLENGING BEHAVIOR	WHAT WE DO

Why I behaved the way I did	What helped me



ASSESSMENT

- antecedents
- consequences
- communicative function
- medical variables
- history of interventions
- learning style
- motivational assessment
- recent events
- baseline

Hypothesis Testing

Change the Environment

Teach New Skills

Reinforcement Strategies

Emergency Strategies

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DID ANYONE SAY.......

"PLEASE PUT ME IN TIME OUT."

"PLEASE TAKE MY RADIO AWAY."

"PLEASE IGNORE ME AND ACT LIKE I DON'T EXIST."

A-B-C ANALYSIS

Antecedent conditions	Description of behavior	Consequences
setting, people present, activity, environmental conditions, time, date.	describe what the person did, the duration, intensity.	describe what happened after or as a result of the behavior

COMMUNICATION INTERVIEW

SCHOOL:

STUDENT:

DATE:

EXAMINER:

CUE QUESTIONS	Crying	Aggression	Tantrums/Self Injury	Shakes 'no'/Nods 'yes'	Facial Expression	Passive Gaze	Gaze Shift	Proximity	Gestures/Pointing	Gives Object	Pulling Other's Hands	Touch/Move Other's Face/Body	Grabs/Reaches	Enactment	Removes Self/Walks Away	Vocalization/Noise	Intonation	Inappropriate Echolalia	Appropriate Echolalia	One-Word Speech	One-Word Signs	Complex Speech	Combined Signs	FUNCTIONS COMMENTS
1. Requests for affection/ interaction What if S wants:																								1. Requests for affection/ interaction
adult to sit near																								
peer to sit near?																								
non-hand. peer to sit near?																								
adult to look at him?																								
adult to tickle him?																								
to cuddle/embrace?																								
to sit on adult's lap?																								
other:																								
2. Requests for adult action What if S wants:																								2. Requests for adult action
help with dressing?																								
to be read a book?																								
to play ball/a game?																								
to go outside/to store?																								
other:																								
3. Requests for object, food, or things What if S wants:																								3. Requests for object, food, or things
an object out of reach?																								
a door/container opened?																								
a favorite food?																								
music/radio/T.V.?																								
keys/toy/book?																								
other:																								
4. Protest What if:																								4. Protest
common routine is dropped?																								
favorite toy/food taken away?																								
taken for ride w/out desire?																								
adult terminates interaction?																								
required to do something doesn't want to do?																								
other:																								
5. Delaration/Comment What if S Wants:																								5. Declaration/comment
to show you something?																								
you to look at something?																								
other:																								

Peck, Schuler, Semmel (1984)
Contact Dr. Loes Schuler at San Francisco State University for more information

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BEHAVIOR OF CONCERN:

WHAT I THINK MY STUDENT IS TRYING TO SAY TO ME:

CHANGES I CAN MAKE.....

IN MY CLASSROOM:

IN HOW I PROVIDE INSTRUCTION TO HIM/HER:

IN TERMS OF A BETTER WAY TO GET WHAT S/HE WANTS:

HOW I'LL DEAL WITH THE OLD BEHAVIOR WHEN IT HAPPENS:

THINK ABOUT A PERSON YOU KNOW...

1. WHAT BOTHERS THAT PERSON?

2. HOW DO YOU KNOW? HOW DID THEY TELL YOU?

3. WHAT HELP MIGHT THEY ASK FOR?

SIBIS™, and a BRI Developed Device are Topics of Discussion at Working Group Meeting

The BRI Working Group held a meeting on October 10, 1990 in order to discuss the Court's concerns with the use of contingent electric shock. In attendance were the three Working Group members, Drs. Ogden Lindsley, Bea Barrett and Joe Morrow as well as two guest participants, Dr. Pancho Barrera of the Southwestern Regional Center of Ontario, Canada and Dr. Don Williams of the Richmond State School in Texas. Also consulted during the meeting were BRI staff members; BRI counsel, Eric MacLeish; the court monitor, Dr. John Daignault and court-appointed attorneys Ellen Nelson and Elizabeth Balashak.

Following the meeting, the group issued a report at the request of the Court in which they addressed the clinical use of electric shock at BRI. In its report, The Working Group raised the question of the efficacy of continuing to treat high-frequency life threatening behaviors with the relatively low levels of shock generated by the SIBIS™ device. (SIBIS™ is the acronym for Self-Injurious Behavior Inhibiting System, which is the first electric shock device used at BRI. Technically, SIBIS™ produces shock at an average milliamperage of 1.5mA.) The Working Group suggests that an increase to levels as high as 47.5mA would not be unreasonable, and would in fact be supported by the available body of literature on contingent electric shock with individuals who exhibit life-threatening behaviors. BRI has engaged the services of an electrical engineer, David Marsh, of Harmony Design, Inc., to develop a new device that is able to deliver a higher level of shock than SIBIS™ and it is also variable. The Working Group saw the new device and was impressed with it.

The Working Group also addressed the issue of when to terminate the use of shock in terms of an upper limit of number of pulses delivered. In general, the Working Group did not feel that an upper limit should be set. Instead, the group recommended that because each student's case is distinct from another's, the court's requirement for notification to the court monitor on a regular basis in all cases, be followed. The Working Group recommended that BRI and its medical consultants explore the placement of electrodes on areas of the body, other than the arms and legs.

The next meeting is tentatively scheduled for the spring, but phone conferences may be made in the interim, if necessary.

Information, please.

__Please correct my name on your mailing list.
__Please add the following name to your mailing list.
__Please send me some videotapes that give an overview of BRI and its programs.
__I would be interested in exploring the possibility of a visit to BRI. Please contact me to discuss visiting
arrangements.
__I would be interested in exploring the possibility of having a representative from BRI visit me to discuss BRI
as a placement resource. Please contact me regarding this.

Name: ____________________
Title: ____________________
Address: ____________________
____
____
Telephone: ____________________

Please return to Penny Potter in the Student Services Department.

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SPECIALIZED HEALTH CARE AND INTEGRATED THERAPY

Definitions:

Related Services (as defined in PL94-142)

“. . . transportation and such developmental, corrective, or other support services (including speech pathology and audiology, psychological services, physical and occupational therapy, recreation, and medical and counseling services, except such medical services shall be for diagnostic and evaluation purpose only) as may be required to assist a handicapped child to benefit from public education . . ." (Rainforth, York, and Macdonald, 1992, p.26.)

Integrated Therapy

“. . . therapy services provided through strategies associated with the disciplines providing the therapy used within the activities and environments the team deems a priority for the student . . . (Rainforth, York, and Macdonald, 1992, p. 169.)

“. . . a strategy to deliver related services in situations in which skills will be functional and performance meaningful for an individual student." (Rainforth and York, 1987, p. 190.)

Skill Cluster Instruction

“. . . a strategy to teach interrelated motor, communication, and social skills concurrently within a functional sequence. "
(Rainforth and York, 1987, p. 191.)

Specialized Health Care

“. . . Technological health Care procedures for life support and/or health support during the school day." CEC, 1988 (Lehr, 1990, p. 136.)

“. . . other than traditional health care provided in schools." (Lehr, 1990.)

ISSUES

Specialized Health Care

- LRE
- Respect for the privacy and dignity of children
- Who should provide care
- Training and professional updating
- The role of the school nurse
- Job descriptions
- Who will pay
- Transportation challenges
- Contagious conditions

Integrated Therapy

- Where should services be delivered
- Respect for the privacy and dignity of children
- Who should provide therapy
- Training and cross-disciplinary training
- Role release and acceptance
- Licensing
- Liability
- Who is responsible for the child's program
- Who will pay
- Transportation
- What is necessary to enable a child to benefit from special education

"... one cannot automatically assume that the responsibility should be place upon the school nurse and that because the nurse has medical training, she or he will feel competent to implement the necessary procedures. . . (which) may be quite different from those procedures typically administered as part of standard school nursing practices." (Lehr, 1990, p. 144)

GOOD PRACTICES

Specialized Health Care

From Taras, 1992

- involve high level administration
- get access to legal expertise
- provide clear accurate information to staff
- have a health policy in writing (use a medical consultant)
- have comprehensive intake documents and consent forms processed by a health professional

Integrated Therapy

From Campbell, 1987, p. 109

- use a transdisciplinary approach so that ". . . methodologies from each discipline are integrated into one instructional program to minimize the impact of limitations in vision, hearing, movement, and cognition on a student's performance of functional skills."

From Rainforth, York, and Macdonald, 1992

- define program philosophy and involve high level administration in the process
- engage in role release and role acceptance
- promote cross-disciplinary training
- use good group process and collaboration skills
- operate from an ecological curriculum

HERE IS A TEAMWORK WORDSEARCH TO DO ON YOUR WAY HOME!!

A	D	F	I	K	N	P	S	S	U	X	Z	C	E	H	J	M
O	R	T	W	Y	B	S	E	G	J	L	O	Q	T	V	Y	A
Z	W	U	R	P	E	E	V	I	T	A	E	R	C	C	M	K
H	F	C	A	C	D	G	T	E	A	M	S	H	L	O	Q	S
T	V	Y	C	O	N	S	U	L	T	A	T	I	O	N	X	V
S	P	U	M	I	J	G	R	D	A	N	A	S	D	F	F	I
P	S	K	R	N	P	S	S	E	E	X	U	C	E	L	H	J
I	B	A	E	G	J	L	O	M	H	P	Q	T	V	I	Y	C
H	H	F	H	K	M	P	T	R	P	T	U	W	Z	C	D	G
S	I	L	N	Q	S	I	F	O	N	X	E	M	I	T	W	I
R	R	O	C	N	M	L	R	U	P	O	N	G	L	N	K	I
E	G	I	F	M	E	T	B	C	E	N	E	P	O	E	H	K
D	N	Q	O	X	T	W	Z	B	F	J	M	P	S	T	O	F
A	U	C	I	N	T	E	G	R	A	T	I	O	N	S	P	C
E	P	B	C	O	N	S	E	N	S	U	S	Y	H	I	E	O
L	L	E	A	Z	N	K	D	A	R	I	P	S	E	L	O	R
E	V	I	T	A	R	O	B	A	L	L	O	C	V	E	F	O

COLLABORATIVE

CONSULTATION

ROLES

LEADERSHIP

COMMITMENT

LISTEN

CONFLICT

TEAMS

CREATIVE

CONSENSUS

TOGETHER

OPEN

FLEXIBLE

INTEGRATION

TIME

SHARING

SUPPORT

SUCCESS

HAVE FUN

From Rainforth, B., York, J., and
Macdonald, C., Collaborative Teams
for Students With Severe Disabilities,
Paul H. Brooks Publisbng Co., Baltimore, 1992

Table 2.10 Assumptions of a collaborative teamwork approach to education and related services for students with severe disabilities

1 All students can learn given the opportunity and appropriate support.

2 The desired educational outcomes for all students are participation in, contribution to, and enjoyment of family, school, and community life, now and in the future.

3 All students, regardless of abilities, interests, and needs, must grow up and learn together in the same school and community environments in order to achieve desired educational outcomes

4 It is the explicit responsibility of the collaborative educational team to assist students in achieving desired educational outcomes.

5 The collaborative team is comprised of the student, significant family members, friends, and the education and related services personnel required to assist students in achieving desired educational outcomes.

6 Positive social interdependence among team members must be structured to realize the benefits of collaborative teamwork.

7 Discipline-referenced knowledge and skills are shared among team members so that relevant expertise is available to students in all aspects of their educational program.

8 An ecological curricular design is required to assist students in achieving desired educational outcomes.

9 An Individualized Education Program (IEP) is developed jointly by the collaborative educational team and reflects an integrated approach to service, design, and provision.

10 Collaborative teamwork strategies must remain flexible in order to meet changing needs of students and families.

Collaborative Teaming to Insure Successful Inclusion

The process of teaming is an effective strategy for planning and problem solving to meet the needs of a child with disabilities in the regular classroom. In the Swanton Elementary and Middle Schools in Swanton, Vermont (Franklin Northwest Supervisory Union), a school site collaborative teaming process takes place between parents, teachers, special educators and administrators. The key features of this team process will be described in this article. This feature is based upon a presentation made at the California Research Institute December 6, 1989, Institute by Mary Lynn Riggs, Principal, and Carol McHugh, Teacher, Swanton Elementary and Middle School.

Elements of the planning team process

In order to meet the individualized needs of students with disabilities in the regular classroom, the use of a planning team is a very effective strategy. It serves the following function:

- To provide support to instructional staff in regular education settings through the development of an instructional plan.
- To enable parents to be involved in the educational planning for their child.
- To develop transition plans for a student's movement to the next school placement.

Making it work

The team works together to insure adequate supports are available to students in the regular education environment. The team members problem solve, brainstorm ideas for individualized adaptations, identify needs and provide each other support.

In order to operate an effective team, the team membership, including team characteristics and team members' roles should be clearly delineated. Furthermore, the ground rules for the planning team should be well understood by all participants.

Who's on the team

The team players are the foundation, and, therefore, the composition of the **planning team** is very important. Membership must include "key players." Individuals in the following role groups would constitute potential team members:

- Regular class teacher (as the core person)
- Integration specialist (if applicable)
- Administrative support (principal)
- Mainstream special education support
- Related service staff
- Parent/family
- Other staff as identified by team (i.e., school nurse, social worker, school counselor, other teachers)

Characteristics of effective teams

Clearly, the "key players" and number of team members will vary depending on the individual child, but regardless of the context, effective teams should have the following characteristics:

- ✓ Two or more members on the team
- ✓ Active parent involvement on the team
- ✓ Members with various roles on the team
- ✓ A shared framework and purposeful unified goal (no hidden agendas!)
- ✓ Members that engage in problem-solving and collaborative activities to reach goals
- ✓ Shared and allocated resources

Who makes a good team member?

The success of the planning team relies heavily on the ability of its members. To put a planning team into operation, team members with the following characteristics will be important:

Team members who:

a) treat others as *individuals*
b) *accept* and *appreciate differences* in others
c) are *flexible*, especially when faced with stress
d) are *active*, *participating*, and *productive*
e) are willing *learners*
f) *communicate* in constructive ways
g) are willing to *share* work, responsibilities, accolades and failure
h) bring problem-solving *skills* and collaborative *values* to the group

Running the team

Members of the team take on varying roles to ensure the team achieves its purpose, including:

- ➡ Facilitator: facilitates the meeting by encouraging the participation of each team member
- ➡ Recorder: records pertinent information and decisions made by the team. Minutes are taken at each meeting utilizing a "planning team" format
- ➡ Time keeper: watches the clock

Finally, to be successful, the team must have the support of the principal. The principal is a vital member of the team. As the educational leadership within the building, the principal acts as the:

a) philosophical anchor for the team
b) coordinates logistics
c) provides teacher support
d) allocates resources
e) makes bottom-line decisions
f) serves as the link to the community

In conclusion, the comprehensive planning process described in this article is part of an integration model in place in the Franklin Northwest Supervisory Union, which is focused on shared responsibility and collaboration. For further information please contact Mary Lynn Riggs, Principal, Swanton Elementary Central School, Church Street, Swanton, Vermont 05488.

California Research Institute. (1990). "Collaborative Teaming to Insure Successful Inclusion". *Strategies on the Integration of Students with Severe Disabilities*, 1(3),11-12.

Reproduced by PEAK Parent Center with permission from California Research Institute, San Francisco State Univ.

Techniques for Effective Communication

☞ **"I" MESSAGES** This technique is an important communications tool. "I" messages enable you to be responsible for your own thoughts and feelings. "I" messages can (a) tell someone else your feelings about a situation of action; (b) describe the problem in neutral terms, and (c) tell the effect it has on you. It is difficult for anyone to argue with someone who uses an "I" message because another person cannot deny or challenge *your* feelings.

examples "I am frustrated when I am interrupted in conversation because I forget what I want to say and I feel threatened." Or "When you make that kind of noise in the room, I get very upset because people tell me I'm not a good leader." Or "I like the way you talk to children, Jean."

☛ **CLARIFICATION** Use this technique when you wish to check the accuracy of a message, to understand more clearly what the other person is saying, or to hear the message repeated so that you can think about it.

examples "I'm not certain I understand. Please clarify for me." Or "Could you explain that process once again? I'm not clear on the last step."

☞ **SUPPORT STATEMENTS** When you agree with another person, let him or her know with a supportive statement. People like to hear positive feedback from others. Positive comments help people feel valued and wanted. This technique encourages people to contribute their personal strengths and resources to the task.

examples "I'd like to go along with your comment, Jackie." Or "Hey, that's a good idea, George." Or "I'll support that point, Terry." Or "John, I'm in favor of your approach."

(OVER)

☛ **ELABORATION** Use this technique when you want more information from the speaker. It works best if you can be specific about your request. Use the other person's name in the request.

examples "I'd like to hear more abour that car, Jerry; please continue." Or "Say, Bob, could you give a few examples of how the machine could work in our department?" Or "I need more details before I can make a decision, Judy. Give me the most important ones, please."

☛ **TRANSITIONS** When you want to add something to a discussion, this technique is effective. Mention the name of the last person to speak on the subject to show that person has been heard. This technique works well in group discussions.

examples "Adding to what you've said, Sue, I'd like to suggest . . ." Or "I think your input has helped me, Mary, and I'd like to say . . ." Or "Agreeing with John and Jim regarding the plan, I propose we . . ."

☛ **EFFECTIVE QUESTIONS** Often it is hard to question someone with professional credentials because we're afraid questions will be regarded as challenges. But when we need information, it's necessary to ask questions. Use a relaxed and open manner rather than a belligerent one. Let the other person know that you really *want* to hear his answer. Don't indicate that if the question is not answered the way you *expect*, then you won't accept it.

examples "Do you mean, Mr. Smith, that my son can't participate in this program if I don't sign the IEP?" Or "What do you feel is the most important thing my child should learn next year?" Or "How many hours of speech therapy do you think Johnny needs to improve his speech?"

☛ **CLOSURE** Use this technique when you are asked a question by someone else. Answer the question, and then make closure by making a simple comment.

examples "Does that answer your question, Tom?" Or "Are you clear on the idea, Michelle?" Or "I'd like to summarize what we have been discussing."

August 1989
Adapted with permission from Washington PAVE Parent-to-Parent Training Project

COLLABORATION

COLLABORATION

"TO WORK TOGETHER. TO WORK TOGETHER IN SOME LITERARY, ARTISTIC OR SCIENTIFIC UNDERTAKING. TO LABOR TOGETHER. TO WORK JOINTLY TOGETHER WITH OTHERS AND TO COOPERATE."

TEAMWORK

"WORK DONE BY SEVERAL ASSOCIATES WITH EACH DOING A PART BUT ALL SUBORDINATING PERSONAL PROMINENCE TO THE EFFICIENCY OF THE WHOLE (WEBSTER'S, 1987).

EDUCATIONAL LITERATURE

COLLABORATION DEFINED AS, "A PROCESS OF PROBLEM SOLVING BY TEAM MEMBERS, EACH OF WHOM CONTRIBUTES HIS OR HER KNOWLEDGE AND SKILLS AND IS VIEWED AS HAVING EQUAL STATUS ."(Sileo, Rude, & Luckner, 1988; Vandercook & York, 1990; Zins, Curtis, Graden & Ponti, 1988).

From: Rainforth, York & Macdonald (1992). Collaborative Teams for Students with Severe Disabilities: Integrating Therapy and Educational Services. Paul H. Brookes, Publisher.

COLLABORATION

Share common beliefs and work towards common goals

People with varying areas of expertise who share group tasks, responsibilities and group leadership

Each person contributes unique perspectives and expertise

Equal membership, nonhierarchical relationships

Problem-solving and making decisions by consensus

Communicating effectively with others

Commitment to working with others

Openness to share and learn

Good listening skills

REASONS TO COLLABORATE

- Research suggests that instructional adaptation in general education classrooms leads to success of exceptional students in general education
- Educational consultation/collaboration can address some teacher concerns regarding mainstreaming
  (e.g., lack of preparation to work with exceptional students; inconsistent or nonexistent special education support services)
- Evidence that consultation/collaboration programs can be effective
- Cost-efficient when collaborating teachers develop teaching and management strategies that might prevent future classroom problems
- Maximizes teacher expertise and minimizes duplication of effort
- Impacts more students (identified & nonidentified)
- Increases teachers' skills
- Parents become more directly and actively involved in students' educational programs
- Greater flexibility is possible concerning when and in what qualtity services are provided compared with other more traditional special education service delivery options
- Close monitoring enables educators and parents to prevent some student problems
- Assists in provision of least restrictive environment for exceptional students

From Kathleen C. Harris, PH.D.
A Presentation, "Effective School
Collaboration" January 24, 1990

BENEFITS OF COLLABORATION

REALIZATION OF THE DIVERSE PERSPECTIVES, SKILLS AND KNOWLEDGE AVAILABLE FROM THE VARIETY OF DISCIPLINES REPRESENTED ON THE EDUCAIONAL TEAM; CREATES A TREMENDOUS RESOURCE FOR PROBLEM SOLVING

ANOTHER BENEFIT OF COLLABORATION IS DERIVED FROM THE GROUP INTERACTION IF STRUCTURED FOR COOPERATIVE, AS OPPOSED TO COMPETITIVE, INTERACTIONS (Johnson & Johnson, 1989). COLLABORATIVE EFFORTS TO ACHIEVE MUTUAL GOALS PROMOTE CARING AND COMMITTED RELATIONSHIPS.

BEST PRACTICES

1. AGE-APPROPRIATE MEMBERSHIP IN NEIGHBORHOOD SCHOOLS
2. INTEGRATED SERVICE DELIVERY
3. SOCIAL INTEGRATION
4. TRANSITION PLANNING
5. COMMUNITY-BASED INSTRUCTION
6. CURRICULAR EXPECTATIONS
7. SYSTEMATIC DATA-BASED INSTRUCTION
8. HOME-SCHOOL PARTNERSHIP
9. SYSTEMATIC PROGRAM EVALUATION

An eight-step problem-solving model

1. Set guidelines: no interrupting
no name calling, put downs, or rude gestures
no blaming,
agree to listen and problem solve.

2. The parties tell what he/she sees as the problem.

3. The parties say what he/she heard each other say.

4. The parties say what their ideal solution would be.

5. The parties say what solution he/she is prepared to live with.

6. The parties agree to a solution all can live with.

7. The parties make a plan to carry out the solution agreed on.

8. The counsellor follows up to see if the solution worked. All celebrate success, or, if the plan is not working, go back to Step 6, brainstorm other solutions, agree on one, and try again!

Fran Jovick is an elementary scho
counsellor in the Sunshine Coast Sc
District and vice-president of the B.
Teachers for Peace Education.

STEPS FOR PROBLEM SOLVING

As individuals or groups, we try to solve problems and set goals every day of the week. Here are some steps which you may be able to apply to solve problems.

DEFINE WHAT YOUR PROBLEM IS

In other words, where do you want to go (your goal)? What do you want to accomplish in relation to the situation? Be clear about the problem before moving on.

PROBE FOR WHAT MAKES IT A PROBLEM

Between where you are and where you want to be is a certain amount of "space." It's strewn with obstacles and pitfalls. Study them one by one. Don't just describe them by saying what they are. Talk about the why, the cause behind the what. Get all the facts which are pertinent to the reasons for the problem.

SEARCH FOR POSSIBLE SOLUTIONS

Keeping your goal in mind, look for what you can do to get past the obstacles. Write down all your ideas--even far-fetched ones. The goofiest notions sometimes are winners after a little polishing. Reserve judgment and criticism until the next step.

TEST THE POTENTIAL SOLUTIONS

If you understand your problem well, you can now begin to pick out the most promising solutions. Weigh them carefully in light of the facts, not prejudices. Look at the positive and negative implications of each solution.

CHOOSE THE BEST SOLUTION

You should now be prepared to make an enlightened, informed decision.

MAP OUT A PLAN OF ACTION

Here you are putting your solution to work. This may be simple or very complicated. You may have to develop a long-range plan with "easy stages." It should be a realistic plan which stands a good chance of success. Use information and people as resources. The more people and resources involved, the more energy to get you where you're going.

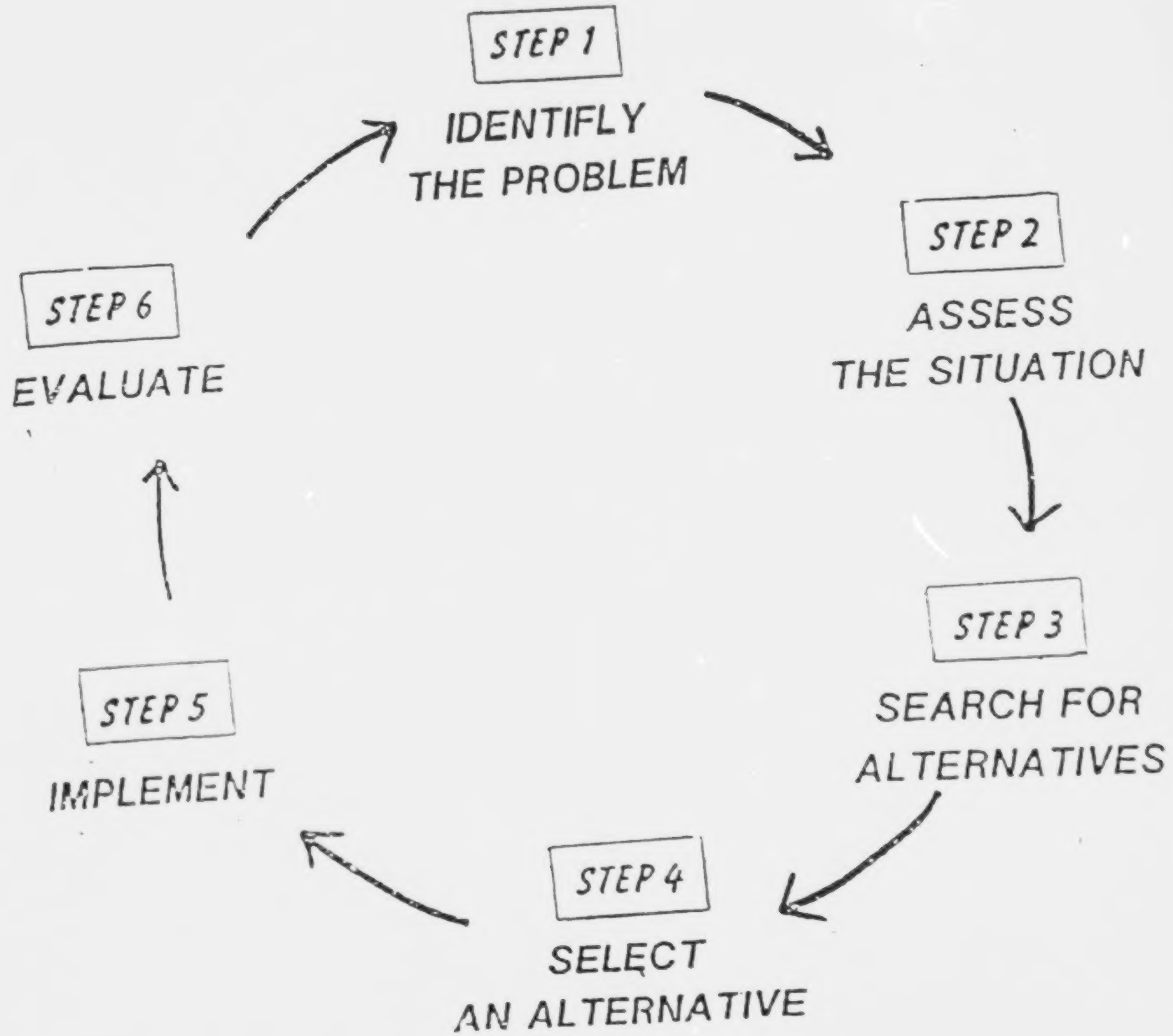
TAKE A PAUSE FOR APPRAISAL

Constant evaluation (studying how well you're doing and how you're doing it) is as important as any other step. Don't be surprised if your appraisal brings out a few facts that alter your solution, or even cause you to set new goals. Problem solving--like living itself--is a continuous process.

PEAK PEAK Parent Center, Inc., 6055 Lehman Drive, #101, Colorado Springs, CO 80918
(719)531-9400 - (719)531-9403 (TDD) 1-800-284-0251 (Colorado Parents Only)

PROBLEM SOLVING:

A CONFLICT RESOLUTION APPROACH TO COMMUNICATION BREAKDOWN IN THE TRANSDISCIPLINARY MODEL



STEP 1

IDENTIFLY
THE PROBLEM

STEP 2

ASSESS
THE SITUATION

STEP 3

SEARCH FOR
ALTERNATIVES

STEP 4

SELECT
AN ALTERNATIVE

STEP 5

IMPLEMENT

STEP 6

EVALUATE

PEERS

PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

PROJECT DIRECTOR

Patrick Campbell, Asst. Superintendent/Dir
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3567
(916) 657-5086 FAX

REGIONAL OFFICES

Tom Neary
650 Howe Avenue
Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D
Ed. Psychology Dept.
CSU, Hayward
Hayward, CA 94542
(510) 881-3087 or
(415) 338-7849

Suzanne M. Gilbert
El Toro HS, Room 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8538
(714) 837-5066 FAX

Steve Johnson, Administrator
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3256
(916) 657-5086 FAX

SCHOOL SITE TEAMS
DAY 5

OBJECTIVES

Participants will:

1. develop an awareness of how a general education classroom climate can support inclusion.
2. become familiar with evaluation strategies for examining inclusion.
3. report on team action plans.
4. evaluate the institute.

AGENDA

		page number
8:30	Objectives/agenda	
8:35	Team reports on action plans	83
9:15	"From Special Educator to General Educator: A New Perspective"	84
10:30	BREAK	
10:45	Overview to evaluation of inclusion	85
11:05	Scenarios	88
11:20	Debrief scenarios	88
11:30	Team reports on action plans	88
12:00	Institute Evaluations	89

Beckstead, S. & Goetz. (1990). EASI II: Social Interaction Scale. v.6. Adapted from Goetz, L. ; Haring, T. & Anderson, J. (1983) Educational assessment of social interaction. San Francisco CA: San Francisco State University, California Research Institute.

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Roger, B.; Gorevin, R.; Fellows, M. & Kelly, D. (1991). School administrator questionaire activity 20. In Schools are for all kids (SAFAK). School Site Implementation: Level II, pp. 71-72.

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MATERIALS

Topic: Teams Reports on Action Plans (40 min.)

8:35
TRAINER'S NOTES

You've worked hard this week, dealing with an enormous amount of information and materials. You've also had time to work as a team to determine how to use the information covered this week and to create a plan of action at your school site. We appreciate the time you've spent both in the sessions and outside the formal sessions on your own, and we hope the simple fact that you lived and worked together for a week has helped to build the comraderie effective teams have. We'd like to hear from each team this morning as you share the actions you intend to take at your site and district level to support inclusion. Since we have a number of teams to report, please try to stay within a 5 minute reporting period. Be sure to leave a copy of your action plan with us so that we can follow up with you through the school year.

DIRECTIONS

As teams report, encourage specific timelines and responsibilities for actions if they are not mentioned. For example, one action might be to plan an information fair regarding inclusion at back to school night. Be sure that the team has identified who will be responsible for planning the event and timelines are set for planning meetings. Take every opportunity to reinforce team plans and team members. Comments from other team s are welcome as long as they are supportive and brief.

INCLUSIVE EDUCATION

MATERIALS

Topic: Guest Speaker: "From a General Educator's Point of View" (75 min.)

9:15
DIRECTIONS

At this point in the training, it is helpful to bring in a guest speaker, a general education teacher who has experience in fully including students with severe disabilities in the general education classroom. A speaker who talks from this perspective can do a lot to tie together the whole week's training. Also, a speaker with this background can do a lot to verify what may have sounded like only theory earlier in the week. Suggest to the speaker that s/he bring slides to make the presentation real. It's also helpful to advise the speaker in advance of the material teams will have covered during the week, and to let him or her know the composition of teams, grade or school levels, etc.

Slide projector
Screen
Overhead projector

TRAINER'S NOTES

This morning we have the opportunity to hear from someone who has been involved in providing inclusive education as a general education teacher. She's experienced the challenges and the rewards one finds in this process and wants to share them with you.

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Topic: Evaluating Inclusive Efforts (75 min.)

10:45
DIRECTIONS

Distribute copies of tools/ instruments to each participant. Have each on overhead as well.

TRAINER'S NOTES

As you know, it's critically important that we evaluate our inclusive efforts from several perspectives. Superintendents, principals, parents, directors of special education, and teachers are all extremely interested in the outcomes of inclusive education for both students with and those without disabilities. The first activity we need to engage in when deciding what and how to evaluate is to ask, "What outcomes am I looking for?" or "What needs to be occurring for us to consider this to be a successful program?" Let's hear from you on the outcomes you're expecting. Let's brainstorm on this for 5 minutes.

DIRECTIONS

One trainer writes down contributuions on chart paper, while another facilitates. Probable contributions may include, e.g. students are learning, students achieve their IEP objectives, students are interacting, students have friends, general education staff are positive, the program is effective without costing more than expected, team members are satisfied with team process, students have equivalent services to those in other integrated options, etc.

TRAINER'S NOTES

Okay, I think you're right on target. It's extremely important that you think about this and lay it out before the fact, at the outset of inclusion, so that you won't miss opportunities to measure those outcomes before and during the year, or to make comparisons from the beginning to the end of the school year.

MATERIALS

Easel, chart paper, pens

Overhead projector

Overheads of evaluation tools and copies of potential evaluation instruments:

PEERS Implementation Site Criteria (1991, rev.)

CRI School Administrator's Questionaire(SAFAK, 1991)

CRI General Education Classroom Instruction Survey, (1990).

CRI Educator Survey, (1990).

Assessment of Student Participation (Minnesota, 1989)

Topic: Evaluating Inclusive Efforts (Con't.)

TRAINER'S NOTES (con't.)

Think about who your audience is for evaluation data as well- Is it the Board of Education? If so, what do they need to hear and see in order to measure its success? How will you convey this information to them? Think also about *qualitative* as well as *quantitative* data.

Once you know your target outcomes, the questions you want to answer, e.g. "Do students have friends? Are they achieving their objectives? Are regular educators satisfied?", then you can begin to select or develop tools to measure these outcomes. I want to share some potential tools with you and encourage you to look further and develop tools that will address your specific concerns. I also want to encourage you to consider *qualitative data collection*, such as journals, open-ended interviews, videotaped observations and portfolios.

DIRECTIONS

Introduce each instrument and discuss its potential use. Allow for questions and discussion. Review items and areas covered and questions participants might address.

TRAINER'S NOTES

PEERS Implementation Site Criteria (Halvorsen, Neary & Smithey, 1991)
Overall program evaluation; looks at best practice variables. Based on several tools including PQI (Meyer, Eichinger & Park-Lee, 1987) which has been validated. Site criteria have been used in CRI studies and are being adapted for use in evaluation in Indiana.

School Addministrator's Questionaire (CRI, SAFAK, 1991)
Additional survey that could be used to look at principals' attitudes pre and post inclusion.

Educator Questionaire (CRI, 1990)
Used to examine general educators' attitudes and perceptions pre and post inclusion.

MATERIALS

(Refer to) IMPACT Nov. 1991 issue UAP-U. Minn. on studies of effects on non-disabled students

EASI (Goetz, Haring, Anderson, 1983; rev. 1990, Beckstead & Goetz)

Engaged Time, CRI, 1991. (See reference list).

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Topic: Evaluating Inclusive Efforts (con't.)

TRAINER'S NOTES (con't.)

Regular Education Classroom Checklist (York, Vandercook & MacDonald, 1989)
Used to examine program quality for individual students through observation.

Assessment of Student Participation in General Education Classrooms (MacDonald & York, 1989)
This is a good formative (ongoing) tool for identifying skills the student is performing and providing information on necessary program changes or need areas for instruction/support.

DIRECTIONS

Additional instruments you may wish to obtain permission to use include:
Circles: Parent Interview (CRI, 1991)
Helpful in obtaining parent perceptions of the relationships in which students are engaged, and those that have developed.

Educational Assessment of Social Interaction (EASI, 1983; revised ed. 1990)
Allows us to obtain (through observation) specific data on student interactions.

Engaged Time (CRI, 1992)
Used to examine levels of engagement or participation in instruction.

Contact authors in reference list to obtain permission and instrument copies.

TRAINER'S NOTES
These are simply a few of the types of tools available to you. What we'd like you to do now is to look at the 4 evaluation scenarios that we're distributing. Let's count off from 1-4 and each team take one

MATERIALS

Topic: Evaluating Inclusive Efforts (con't.)

TRAINER'S NOTES (con't.)

scenario. We want you to think about what you've learned this week about quality inclusive education, what the markers are, and to consider these in discussing, "What's wrong with this picture?" or "What was lacking in the program that led to the problem as stated, and how would we approach it as a team?". You'll have 10 minutes to discuss this, and then we'll report back at 11:20. Please take on the necessary roles in your group, i.e. facilitator, recorder, reporter, time keeper, encourager.

DIRECTIONS

Have teams count off so Team #1 takes scenario #1 and so on through #4, then repeat for additional teams. Trainers circulate among the teams. At 11:20, have teams report briefly on what was lacking and how they would address the issues as presented. Record on chart paper as teams report.

Evaluation scenarios
Copies for all

Chart paper
Easels
Marking pens

TRAINER'S NOTES

This exercise serves to highlight for you the importance of ongoing evaluation, of having a structure for feedback and discussion, for ongoing problem solving. No innovation is without problems, and inclusive education is no exception to this. We should expect and prepare for the challenges ahead by 1) reaching consensus on our vision and mission for all students, 2) how we plan to operationalize that vision, 3) what are the program quality indicators that will lead to the outcomes we desire, and 4) what kind of support systems are necessary to achieve those outcomes. Finally, you need to build into your plan a mechanism for evaluating whether those outcomes are occurring, and for making necessary program changes as you proceed. So let's be sure that your Team Action Plan includes an objective for developing your evaluation system and plans. We'll take the next half hour in teams to review your plans, and then have an informal report from each team on your plan before you close.

INCLUSIVE EDUCATION

MATERIALS

Topic: Closing

11:30
DIRECTIONS

Teams finalize action plans. Trainers circulate. Teams will report at 12:00.

12:00
TEAM REPORTS

12:30
DIRECTIONS

Participant evaluations should be completed at this time. It is suggested that in addition to written evaluations, oral evaluations would be valuable, particularly relating to those needs identified on Day 1 during the first activity. Distribute certificates of completion in closing.

Note:
Alternative closing activity.
If you have more time to work with during the week and/or on the final day, we'd suggest that you prepare teams for an alternative culminating reporting activity. Two colleagues, Renee Gorevin from California Implementation Sites and Pat Rainey, from California Deaf-Blind Services, who replicated this module with adaptations, directed their teams early in the week to design an alternative strategy for depicting their plan. All sorts of creative possibilities exist, and this can be a strong team-building activity. Songs, skits, dances, murals- are but a few potential vehicles. We encourage you to consider this worthwhile alternative as an exciting way to end your week.

Wall charts from day 1

Evaluation forms

Certificates of completion

Action plan forms

SCHOOL ADMINISTRATOR QUESTIONNAIRE

Name (optional)____________________ Job title ____________________

Part 1 - Demographic Data

Directions: Please fill in the following information. Principals and site staff respond to the questions for their school site and SPED Directors/staff respond to questions for the District/LEA.

1. Which word best describes the community in which you work?

   Urban ____ Rural _____ Suburban _____

2. Grade levels included in your school/district: ___________

3. Years experience as an administrator: _________

4. Number of years in your current school/district: _____

5. Total number of special education students currently served in your school/district: _______

6. Number of special education teachers______; SPED classrooms in your school/district __________

7. Number of Special Education Students by classification:

   No._____ Label ______________________________________

   _____ ______________________________________

8. Number of regular students currently serving in in your school/district: _______________

9. Number of regular classrooms in your school/district: ___________

10. List other special programs offered in your school/district (Chapter 1, ESL, etc.):

11. Are there special education students from your attendance area that attend a special school? _______________

    If so, how many? _______________ What are their disabilities?

12. Are there special education students from your attendance area that are sent out of the district to another agency or private school? _______________

    If so, how many? _______________ What are their disabilities?

13. What categories of special education students are included in regular classrooms for all or some part of their day? (check)

    mildly disabled _______
    moderately disabled _______
    severely disabled _______

14. Specify the range of time (number of hours) special education students are generally in regular classes daily: ___________

ON: SAFAK TRAINING, CA RESEARCH + INSTITUTE
Reefe, B + Crevin, R. (1991) 693

Part 2

Please read the following statements and decide to what degree you agree or disagree:
1 = strongly disagree; 2 = disagree; 3 = agree; 4 = strongly agree

		PRE	POST
1.	Students with severe disabilities can benefit from primary placement in regular education classrooms with support and assistance from special education.	1 2 3 4	1 2 3 4
2.	I would be willing to include/support a class in my school that is team taught by a regular teacher and a special teacher	1 2 3 4	1 2 3 4
3.	Nondisabled students can benefit from the placement of students with disabilities in their classes.	1 2 3 4	1 2 3 4
4.	I would be willing to support related services personnel (i.e., occupational, physical, and speech therapists) working in regular classrooms in my school.	1 2 3 4	1 2 3 4
5.	If class sizes were decreased I would support the primary placement of a student that is severely disabled in the regular classroom.	1 2 3 4	1 2 3 4
7.	It is clear that having two separate delivery systems, one for nondisabled and one for students with disabilities, is counterproductive.	1 2 3 4	1 2 3 4
8.	I would welcome the presence of a special educator working in my regular classrooms.	1 2 3 4	1 2 3 4
9.	I would welcome assistance from special education in the form of consultative service and materials for regular educators.	1 2 3 4	1 2 3 4
10.	I would welcome additional information on how to assist in educating special education students.	1 2 3 4	1 2 3 4
11.	With instructional assistants (aides) assigned to regular classrooms, I would support the full day placement of special education students in regular classes.	1 2 3 4	1 2 3 4
12.	Most special education students should be integrated for at least some part of the day.	1 2 3 4	1 2 3 4
13.	Having special education students in regular classes is beneficial to the teachers.	1 2 3 4	1 2 3 4
14.	Having special education students in regular classes is beneficial to the regular students.	1 2 3 4	1 2 3 4
15.	Having special education student placement (with special education support) in regular classes does not greatly increase the workload of the teachers.	1 2 3 4	1 2 3 4
16.	The regular education teachers should be included in the decisions regarding special education students in their classes.	1 2 3 4	1 2 3 4
17.	My own instructional leadership skills are sufficiently strong to adequately support a program which integrates special students in the regular program.	1 2 3 4	1 2 3 4

General Education Classroom Instruction Survey
(CRI 1990)

1. I feel my teachers understand students' disabilities 1 2 3 4 5

2. I feel that general education teachers meet special education student's academic needs 1 2 3 4 5

3. I feel that general education teachers meet special education student's emotional needs 1 2 3 4 5

4. I feel that general education teachers are effective with these students with support from special education teachers 1 2 3 4 5

5. I feel comfortable adjusting academic requirements for special education students 1 2 3 4 5

6. I feel that special education students benefit from being in the regular classroom 1 2 3 4 5

7. Do your general education teachers serving special needs students have aides to assist? yes__ no_____

8. Have your general education teachers been provided adapted materials? yes__ no____

9. Have your general education teachers had inservice on special education? yes__ no_____

10. Have your general education teachers been provided assistance in behavior management? yes__ no_____

11. Have your general education teachers been instructed in teaching strategies for special learners? yes__ no_____

Educator Questionaire
(CRI 1990)

1= Strongly disagree; 2= Disagree; 3= No opinion; 4= Agree; 5= Strongly agree

1. I feel I understand this student's disability 1 2 3 4 5

2. I feel I am able to meet this student's academic needs 1 2 3 4 5

3. I feel I am able to meet this student's emotional needs 1 2 3 4 5

4. I feel I get enough help from the special education teacher in serving this student 1 2 3 4 5

5. I feel comfortable adjusting academic requirements for this student 1 2 3 4 5

6. I feel having this student in my class is beneficial to her/him 1 2 3 4 5

7. I feel having this student in my class is beneficial to me 1 2 3 4 5

8. I feel having this student in my class is beneficial to the other students 1 2 3 4 5

9. This student does not greatly increase my workload 1 2 3 4 5

10. I am included in decisions re: this student 1 2 3 4 5

11. Have you been provided special education aide time? yes__ no___

12. Have you been provided adapted materials? yes__ no_____

13. Does a special educator work in your classroom ? yes__ no___

14. Have you been provided specific information about this student? yes__ no___

15. Have you been provided teaching strategies for the student you are serving? yes__ no___

16. Have you been provided assistance in behavior management? yes__ no___

ASSESSMENT OF STUDENT PARTICIPATION IN GENERAL EDUCATION CLASSES

dent: ______________________ Grade, Subject, and Class Period: ______________________

ssroom Teacher: ______________________ Prep Periods: __________ Room Number: _____ Number of Students in Class: _____

ssment Completed by: ______________________ Date: __________

ructions: (1) After the student attends the specific general education class for approximately one week, the team reviews all the skills identified in Sections I and II of this assessment tool.
Score:
- + for items that student consistently performs;
- +/- for items that student does some of the time but not consistently;
- – for items that student never or very rarely performs; and
- NA for items that are not appropriate.

(2) Circle about 5 items that the team identifies as priorities for instructional emphasis for the individual student.
(3) Write objectives for each of the circled items then design related instructional programs.
(4) Review student progress on all items at least 2 more times during the school year. Revise as needed.

I. CLASSROOM ROUTINES AND ACTIVITIES

Date:				Date:			
1. Gets to class on time.				11. Shares materials with peers when appropriate.			
2. Gets seated in class on time.				12. Uses materials for their intended purpose.			
3. Performs transitional activities during class in response to situational cues (e.g., changes in seating, activity, etc.).				13. Puts materials away after use.			
4. Begins tasks.				14. Uses classroom materials and equipment safely.			
5. Stays on task.				15. Works cooperatively with a partner.			
6. Participates in some regular class activities without adaptations.				16. Works cooperatively with a small group.			
7. Terminates tasks.				17. Performs competitive learning tasks.			
8. Tolerates out of the ordinary changes in classroom routine.				18. Readily accepts assistance.			
9. Follows class rules.				19. Evaluates quality of own work (given a model).			
10. Locates/brings materials to class as needed.				20. Copes with criticism/correction without incident and tries an alternative behavior.			

(continued)

vised 9/90 from: Macdonald, C., & York, J. (1989). Regular class integration: Assessment, objectives, instructional programs. In Strategies for Full Inclusion. University of Minnesota: Institute on Community Integration.

II. SOCIAL AND COMMUNICATION SKILLS

	Date:		
21. Interacts with peers:			
a. responds to others			
b. initiates			
22. Interacts with the classroom teacher:			
a. responds to the teacher			
b. initiates			
23. Uses social greetings:			
a. responds to others			
b. initiates			
24. Uses farewells:			
a. responds to others			
b. initiates			
25. Uses expressions of politeness (e.g., please, thank you, excuse me):			
a. responds to others			
b. initiates			
26. Participates in joking or teasing:			
a. responds to others			
b. initiates			
27. Makes choices and indicates preferences:			
a. responds to others			
b. initiates			
28. Asks questions			
a. asks for help			
b. asks for information (e.g., clarification, feedback)			

	Date:		
29. Follows directions:			
a. for curricular tasks			
b. for helping/errand tasks			
c. given to the student individually			
d. given to the students as a group			
30. States or indicates:			
a. don't know/don't understand			
b. when finished with an activity			
31. Orients toward the speaker or other source of input			
32. Secures listener attention before communicating			
33. Maintains eye contact with the listener when speaking			
34. Takes turns communicating in conversation with others			
35. Gives feedback:			
a. gives positive feedback			
b. gives negative feedback			
36. Uses appropriate gestures and body movements when interacting with others			
37. Uses appropriate language/vocabulary/topic of conversation			
38. Uses intelligible speech (volume, rate, articulation, etc.)			
Comments:			

REGULAR CLASSROOM INTEGRATION CHECKLIST

Directions: Record a 'y' for yes and an 'n' for no on the blank preceding each item. If the answer to any of the items is 'no' your team may wish to consider whether any changes should be made and what those changes might be.

GO WITH THE FLOW:

___ Does the student enter the classroom at the same time as classmates?

___ Is the student positioned so that she or he can see and participate in what is going on?

___ Is the student positioned so that classmates and teachers may easily interact with him or her (e.g., without teacher between the student and his or her classmates, not isolated from classmates)?

___ Does the student engage in classroom activities at the same time as classmates?

___ Does the student make transitions in the classroom at the same time as classmates?

___ Is the student involved in the same activities as his or her classmates?

___ Does the student exit the classroom at the same time as classmates?

ACTING COOL:

___ Is the student actively involved in class activities (e.g., asks or responds to questions, plays a role in group activities)?

___ Is the student encouraged to follow the same classroom and social rules as classmates (e.g., hugs others only when appropriate, stays in seat during instruction)?

___ Is the student given assistance only as necessary (assistance should be faded as soon as possible)?

___ Is assistance provided for the student by classmates (e.g., transitions to other classrooms, within the classroom)?

___ Are classmates encouraged to provide assistance to the student?

___ Are classmates encouraged to ask for assistance from the student?

___ Is assistance provided for the student by classroom teachers?

___ Does the student use the same or similar materials during classroom activities as his or her classmates (e.g., Tom Cruise notebooks, school mascot folders)?

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(continued)

Figure 1. Regular Classroom Integration Checklist

TALKING STRAIGHT:

____ Does the student have a way to communicate with classmates?

____ Do classmates know how to communicate with the student?

____ Does the student greet others in a manner similar to that of his or her classmates?

____ Does the student socialize with classmates?

____ Is this facilitated?

____ Does the student interact with teachers?

____ Is this facilitated?

____ Do teachers (e.g., classroom teachers, special education support staff) provide the same type of feedback (e.g., praise, discipline) for the student as for his or her classmates?

____ If the student uses an alternative communication system do classmates know how to use it?

____ If the student uses an alternative communication system do teachers know how to use it?

____ Is the system always available to the student?

LOOKING GOOD:

____ Is the student given the opportunity to attend to his or her appearance as classmates do (e.g., check appearance in mirror between classes)?

____ Does the student have accessories which are similar to his or her classmates (e.g., oversize tote bags, friendship bracelets, hair jewelry)?

____ Is the student dressed similarly to classmates?

____ Is clothing that's needed for activities age appropriate (e.g., napkins instead of bibs, 'cool' paint shirts)?

____ Are personal supplies or belongings carried or transported discreetly?

____ Is the student's equipment (e.g., wheelchair) kept clean?

Given the opportunity (and assistance as needed):

____ Is the student's hair combed?

____ Are the student's hands clean and dry?

____ Does the student change clothing to maintain a neat appearance?

____ Does the student use chewing gum, breath mints, breath spray?

(Figure 1 continued)

PEERS
Day 5
School Site Teams

EVALUATION SCENARIOS

Select one from the appropriate age level. Discuss with your team which factors or quality indicators were lacking in this integration effort, thus leading to these problems or issues. How would you approach this problem and what strategies would you use to resolve it at this time?

ELEMENTARY LEVEL

1. Jim is being included for 75% of his school day in a third grade classroom in Horace Mann School. His special education support teacher, Mary, has been meeting on an ongoing basis after school once every two weeks with John, the general education teacher. Mary divides her time among four general education classes in the school as well as her special day/resource room class, and her paraprofessional, Charlotte works with students in all of these settings as well. John feels that he is having some difficulty communicating with Charlotte, and that she is not able to be flexible in her adaptations of curriculum or lessons when Jim is participating in the reading program. He is concerned that this is detracting from Jim's and the other students reading time in that group. Jim is ambulatory, uses a communication book, and is primarily non-verbal.

2. Christina's IEP states that she will participate in a sixth grade science class for the first time this year. Students in her special class came to Martin Luther King School this year from a special center. Christina is 12, has quadrapalegia, and uses a head switch controlled communication system. There is only one sixth grade at the school, and Henry, the teacher, is uncomfortable about her presence in the class without full-time support. It will be difficult to program paraprofessional or teacher support at all times, since there are 9 students with severe disabilities at the school and three staff. June, the special education teacher, and Christina's parents, are looking for a solution other than changing Christina's IEP.

SECONDARY LEVEL

3. Owen is the special education support teacher for a heterogeneous group of 10 students based in a resource room at Washington High School. It is an open campus, and he decided it would be great to have peers accompany his students (with staff supervision) into the adjacent commercial area for instruction in vocational and other related functional community skills. He raised this possibility at a faculty meeting but has received only minimal response. Many teachers said they felt this would detract from their students' academic programs. He then spoke to the counselors but was told that only seniors who are in Inside Work Experience (IWE) programs would be eligible, and he would have to wait until next semester to recruit them.

4. Lea attends Lincoln Middle School. She has several physical disabilities in addition to her cognitive impairment, and requires frequent suctioning. Training has been provided to all special education staff, with one paraprofessional serving as the primary health aide. Diana, her special education teacher, is working toward more inclusive programming for all of her students, but is finding it difficult to meet with 4-5 general education teachers for each of her 10 students in order to get things going and maintain quality programming. Lea's English teacher, Sue, has recently stated that she does not want Lea, or any student receiving health procedures to do so in her classroom. The remaining English teachers in the department are already including student(s) in their classes.

COALITION ON HUMAN NEEDS
[illegible] Wisconsin Avenue, N.W. Washington, D.C. 20007
[illegible]

[illegible]
[illegible]

HUMAN NEEDS
-- REPORT --

June 21, 1993

AN UPDATE FOR THE LEGISLATIVE COMMITTEE

NEXT LEGISLATIVE COMMITTEE MEETING

The next meeting of the Legislative Committee will be on Friday, June 25, 1993 at 9:00 a.m. the American Public Welfare Association (APWA), 810 First Street, N.E. Suite 500.

SENATE DEADLOCK ON RECONCILIATION BROKEN - SEVERAL HUMAN NEEDS INITIATIVES BECOME CASUALTIES

On Thursday June 17, one day before the deadline in the Congressional budget resolution, the Senate Finance Committee began a formal mark-up of its reconciliation package. The Senate Agriculture Committee also marked up its part of the omnibus deficit reduction package, and there was talk that reconciliation could be on the Senate floor this week. (A copy of the sign-on letter CHN delivered to the Senate is enclosed.)

The Finance Committee finally began its work after several weeks of intense maneuvering within the Senate Finance Committee that pitted major energy industries against the elderly and the poor. The scramble was triggered when Senate Finance Committee member David Boren (D-OK) steadfastly resisted the Btu tax and called for deeper spending cuts, especially in health care and other entitlement programs, than in the House bill.

Senate Finance Committee Democrats finally gave in to Senator Boren's opposition to the Btu tax. To replace the $72 billion which the tax would have raised, they turned to a 4.3 cents per gallon transportation fuels tax, curtailed some individual and business tax breaks, and made deeper spending cuts than those in the House bill. The Democrats' compromise was developed without Republican participation and could encounter resistance on the Senate floor from both Senate Republicans and liberal Democrats.

In crafting the compromise agreement, Committee Democrats found themselves seeking a balance between conservative and more liberal members of the panel. They scaled back the size of a transportation fuel tax originally proposed by Senator John Breaux (D-LA) because of the opposition of Senator Max Baucus (D-MT) and other western state Senators.

The Finance Committee package also avoided deep Medicare and Medicaid cuts floated by Finance Committee Chairman Daniel Patrick Moynihan (D-NY) and advocated by Senator Boren because of the opposition of Senator Jay Rockefeller (D-WV) and the lobbying generated by the American Association of Retired Persons (AARP). At $67 billion over five years, however, the Medicare cuts are approximately $19 billion more than those in the House bill and still are considered too deep by Senate liberals off the Committee, such as Senators Tom Harkin (D-IA), Paul Wellstone (D-MN), and Howard Metzenbaum (D-OH).

Human Needs Programs Scaled Back

Several high priority human needs programs became casualties in the Senate. These include the Mickey Leland Childhood Hunger Relief Act and the Family Preservation initiative which were not viable for several reasons, a major one being the "Byrd Rule". The Byrd Rule strictly limits provisions in reconciliation bills to those that will reduce the deficit or are related to provisions that reduce the deficit - a test which neither program was determined to meet. Even without the Byrd Rule, however, the pressures in the Senate were so intense that it would have been very difficult to include these program expansions.

Two other important initiatives were retained, but scaled back. Single individuals, who for the first time would receive a small Earned Income Tax Credit (EITC) in the House bill, were dropped from the EITC expansion in the package taken up by the Finance Committee. In addition, the credit for families with children was scaled back slightly from the House amounts as follows (House amounts in parentheses):

> * **Families With One Child:** The EITC would increase to 26.0 (26.60) percent of the first $7,750 ($7,750) of earned income in 1994, for a maximum credit of $2,015 ($2,062). The credit would be reduced by 16.16 percent of earned income over $11,000 until it phased out at $23,470 ($23,760). From 1995 on, the credit rate would be 34.0 percent (34.37 percent), and the maximum credit in 1995 would be about $2,098 ($2,120).
>
> * **Families With Two or More Children:** The EITC would increase to 30.0 percent (31.59 percent) of the first $8,500 of earned income in 1994, for a maximum credit of $2,550 ($2.685). The credit would be reduced by 15.94 percent of earned income in excess of $11,000 until it phased out at $27,000 ($28,000). The credit rate would rise to 34.0 (39.66 percent of $8,730 with a phase out at $28,780) percent in 1995, and 39.0 percent in 1996.

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The Childhood Immunization program was retained in its basic form, but a means test was added which is not in the House bill.

The Senate proposal adds a new program to the Social Security Act to provide for a central bulk purchasing program under which the Secretary of Health and Human Services (HHS) will negotiate with vaccine manufacturers over prices. HHS then will distribute the vaccines to the states which must apply and meet certain conditions, including providing assurance that every eligible child receives vaccines without charge.

The Senate proposal defines eligible children as children eligible for Medicaid; children with family incomes up to 75% of a state's median income (for a family of 4 without regard to family size)who are either uninsured or lack coverage for immunizations; and Native American children. The House bill provides that all uninsured or underinsured children regardless of income would be covered.

With possible floor action on the Senate reconciliation bill this week, we strongly urge human needs advocates to be prepared to work against any negative amendments on the Senate floor and to gear up immediately for a grassroots and Washington lobbying effort urging House-Senate conferees to accept the House provisions relating to the Mickey Leland Childhood Hunger Relief Act, Family Preservation, the EITC and Childhood Immunizations. The next few weeks will be absolutely critical for these programs.

ENTITLEMENT CAP AVOIDED IN SENATE FINANCE, BUT OUTLOOK FOR THE FLOOR UNCERTAIN

The Senate Finance Committee compromise avoids the entitlement cap sought by Senator Boren as part of his deficit reduction proposal. However, a cap could be offered on the Senate floor as it was last year by Senator Pete Domenici (R-NM). We also understand that the Senate Democratic leadership is looking at a version of the House-passed entitlement review as an alternative to an entitlement cap. We urge all human needs advocates to monitor this situation closely and to urge all Senators to oppose an entitlement cap.

HOUSE LABOR, HEALTH AND HUMAN SERVICES AND EDUCATION APPROVES FY 1994 APPROPRIATION

The House Subcommittee on Labor-HHS, and Education Appropriations marked up the FY 1994 appropriation in a closed session on Tuesday, June 8. Details of the bill are not being formally released until after the full Appropriations Committee reports the bill during the week of June 21. We will provide a more detailed description of the appropriation after the full committee mark-up this week.

FY 1993 SUPPLEMENTAL APPROPRIATION GOES TO SENATE FLOOR

On June 8, the Senate Finance Committee approved a version of the House stimulus supplemental (H.R. 2244) and combined it with the regular FY 1993 supplemental appropriation (H.R. 2118) also previously approved by the House.

The combined bill, H.R. 2118, slashes summer youth jobs funding from $320 million to $200 million and eliminates waste water construction funds ($290 million) and small business loans ($181 million) which were in the House bill. The immunization appropriation remains at the House level, and Pell grants rose from $160 million to $360 million. Among the program cutbacks approved to pay for the bill were the recession of $130 million in unobligated prison construction funds for the District of Columbia and $500 million for the "Weed and Seed" program.

H.R. 2118 was on the Senate floor last Thursday, June 17, and the Senate will resume consideration of the bill this week on Tuesday, June 22. We understand that Senator D'Amato may offer a welfare-related amendment.

WELFARE REFORM PROCESS BEGINS

On June 11, the Administration formally announced its welfare reform working group, which is co-chaired by Bruce Reed, Deputy Assistant to the President for Domestic Policy, David Ellwood, Assistant Secretary for Planning and Evaluation at HHS, and, when confirmed, Mary Jo Bane, Assistant Secretary for the Administration for Children and Families at HHS. The working group includes 20 other representatives from agencies and departments throughout the government. It will be looking into a wide range of issues, including making work pay, child support, absent parents, transitional support, post transitional work, child care, program simplification, private sector job creation and prevention/family stability. (see enclosed)

The welfare reform working group intends to engage in broad consultation with outside groups. As part of that effort David Ellwood will be speaking to the Coalition on Human Needs welfare reform task force on Tuesday June 22 at 2:00 at the National Association of Social Workers, 750 First Street, N.E., Suite 700.

Also on the welfare reform front, the Senate Finance Committee's compromise reconciliation package unexpectedly includes a five state cost-neutral "demonstration" program on childhood immunizations. The demonstration would sanction families by eliminating one month of the adult share of the AFDC grant for failing to have the children immunized. After that, the adult share of the grant could be withheld for up to six months, but states would have to repay all money that was withheld after the first month once the children were immunized.

States conducting these demonstrations would have to pay transportation costs associated with getting children immunized and make a health professional available in welfare offices to provide the immunizations. It is expected that funds from the childhood immunization program either in the Labor, HHS, and Education bill or under the new entitlement in the reconciliation bill could be used for these purposes.

COALITION ON HUMAN NEEDS
1000 Wisconsin Avenue, N.W. · Washington, D.C. 20007
(202) 342-0726

Jennifer A. Vasiloff
Executive Director

June 11, 1993

Dear Senator:

We, the undersigned organizations, urge you to oppose proposals which would harm low and middle-income Americans as you consider the Omnibus Budget Reconciliation Act in the days ahead. Proposals such as the one introduced recently by Senators David Boren (D-OK), John Danforth (R-MO), J. Bennett Johnston (D-LA) and William Cohen (R-ME) -- as well as others under consideration -- are unacceptable alternatives to the President's economic plan in a number of important respects.

. **Strict and inflexible caps on entitlement spending will harm millions of Americans and jeopardize national health care reform.** Caps on entitlement programs or automatic sequestration mechanisms will disproportionately affect programs serving low and middle-income Americans and fail to address the cost to the federal government of the many tax subsidies benefiting wealthy individuals. Furthermore, imposing stringent caps on funding for Medicaid and Medicare now would make it almost impossible to finance improved access to health care for the millions of Americans who need it. The growth in health care entitlement spending should be addressed as part of the upcoming comprehensive reform of the health care system not as part of the reconciliation legislation.

The Boren Budget Plan, as well as several other recent proposals, would significantly hurt poor Americans. It is critically important to preserve the President's expansion in the Earned Income Tax Credit for working poor families. If enacted, this pro-work, pro-family provision would assure that the income for a family of four with a full-time year-round minimum wage worker would be raised to the poverty line. Other suggestions to reduce federal funding for Medicaid, the Aid to Families with Dependent Children (AFDC) program and cost-of-living adjustments for Social Security payments would seriously harm the most vulnerable Americans and should be opposed. We are also opposed to further cuts in Medicare. Important components of the President's plan that address the needs of the one in five children in this country that lives in poverty must be preserved.

In comparison to President Clinton's economic plan, recent changes that have been suggested would shift the deficit reduction burden from the wealthiest Americans and corporations to other Americans. Some have recommended a reduction in the capital gains tax for wealthy investors or delaying the effective date for tax increases for very wealthy individuals and corporations. These and other regressive changes to the President's deficit reduction outline are unwarranted and inequitable.

The reconciliation legislation the Senate approves should maintain the basically progressive nature of the President's original economic plan. We urge you to oppose changes like the ones mentioned above that depart from this basic principle.

Sincerely,

AIDS Action Council
American Association of Community Colleges
American Association of Retired Persons
American Association of University Affiliated Programs
  for the Developmentally Disabled
American Federation of State, County, and Municipal Employees
American Foundation for the Blind
American Planning Association
American Speech, Language, Hearing Association
Americans for Democratic Action
Bazelon Center
Catholic Charities USA
Center for Community Change
Center for Law and Social Policy
Citizen Action
Coalition on Human Needs
Families USA
Food and Allied Service Trades Department, AFL-CIO
Food Research and Action Center
Friends Committee on National Legislation
Human Rights Campaign Fund
International Association of Fire Fighters
Lutheran Office for Governmental Affairs (ELCA)
National Alliance to End Homelessness
National Association of Community Health Centers
National Association of Counties
National Association of Developmental Disability Councils
National Association of Homes and Services for Children
National Association of Protection and Advocacy Systems
National Association of Social Workers
National Coalition for the Homeless
National Community Aids Partnership
National Consumers League
National Council of Churches

National Council of Jewish Women
National Council of La Raza
National Council of Senior Citizens
National Educational Association
National Mental Health Association
National Puerto Rican Coalition
National Urban League
National Women's Law Center
NETWORK: A National Catholic Social Justice Lobby
Nuclear Information and Resource Service
OMB Watch
Physicians for Social Responsibilities
Public Citizen Congress Watch
Public Employee Department, AFL-CIO
Service Employees International Union
The Arc
United Auto Workers
United Methodist Church, General Board of Church and Society
Wider Opportunities for Women
Women and Poverty Project
Women Strike for Peace
Y.W.C.A. of the U.S.A.

Working Group on Welfare Reform, Family Support and Independence

Chairs

Bruce Reed	*Deputy Assistant to the President for Domestic Policy*
David Ellwood	*Assistant Secretary for Planning and Evaluation, Department of Health and Human Services*
	Assistant Secretary for the Administration for Children and Families, Department of Health and Human Services

Members

Ken Apfel	*Assistant Secretary for Management and Budget, Health and Human Services*
Walter Broadnax	*Deputy Secretary, Department of Health and Human Services*
Robert Carver	*Deputy Assistant Secretary for Returns Processing, Treasury Department*
Maurice Foley	*Office of Tax Policy, Treasury Department*
Thomas Glynn	*Deputy Secretary, Department of Labor*
Ellen Haas	*Assistant Secretary for Food and Consumer Services, Department of Agriculture*
Elaine Kamarck	*Office of the Vice President*
Madeleine Kunin	*Deputy Secretary, Department of Education*
Alicia Munnell	*Assistant Secretary for Economic Policy, Treasury Department*
Larry Parks	*Senior Advisor to the Secretary, Department of Commerce*
Wendell Primus	*Deputy Assistant Secretary for Human Services Policy, Department of Health and Human Services*
Julie Samuels	*Director, Office of Policy and Management Analysis, Department of Justice*
Isabel Sawhill	*Associate Director for Human Resources, Office of Management and Budget*
Eli Segal	*Assistant to the President for National Service*
Eugene Sperling	*Deputy Assistant to the President for Economic Policy*
Michael Stegman	*Assistant Secretary for Policy Development and Research, Department of Housing and Urban Development*
Joseph Stiglitz	*Council of Economic Advisors*
Fernando Torres-Gil	*Assistant Secretary for Aging, Department of Health and Human Services*
Jeff Watson	*Deputy Assistant to the President for Intergovernmental Affairs*
Kathi Way	*Special Assistant to the President for Domestic Policy*
	Surgeon General
	Assistant Secretary for Intergovernmental and Interagency Affairs, Department of Education
	Assistant Attorney General for Policy Development, Department of Justice
	Assistant Secretary, Employment and Training Administration, Department of Labor

Welfare Reform: Next Steps

The Welfare Reform Working Group is charged with presenting a detailed proposal to create a transitional assistance system in line with the broad principles outlined by the President. To tackle this complex task, the Working Group is assigning staff to develop background information and policy options in the following areas:

Making Work Pay -- to explore ways of improving the economic incentives to work and the distribution of financial and other supports for the working poor, such as the Earned Income Tax Credit

Child Support -- to address issues ranging from paternity establishment and support enforcement to the possibility of a child support insurance/assurance program

Absent Parents -- to examine current government policies as they relate to absent parents so that they can better meet their parental responsibilities

Transitional Support -- to review strategies for providing assistance on a temporary basis along with the education, training, and other supports needed to get off welfare and into jobs

Post Transitional Work -- to examine the issues related to employing those reaching the end of their time-limited assistance

Child Care -- to explore how best to meet the need for child care in a system of transitional assistance and mandatory work

Program Simplification -- to look at the rules and regulations of benefit programs for low income families to find ways to make them more uniform and simple

Private Sector Job Creation -- to focus on including in a transitional assistance system the incentives necessary to create jobs for welfare recipients in the private sector

Prevention/Family Stability -- to ensure that efforts to prevent out-of-wedlock births and family break-up are given priority in the reform plan

While federal employees will be staffing the Working Group, they will be seeking input and proposals from individuals and organizations outside the government. Those who are interested in providing input, ideas and suggestions are invited to write to the Working Group at the address provided on the following page. Specific proposals as well as general comments are welcome.

Appendix E

PEERS

Consultant Bank

PEERS PROJECT

CONSULTANT BANK

December, 1992

NOT FOR DISSEMINATION
WITHOUT PROJECT PERMISSION

Note: The individuals listed within have been utilized by PEERS (G0087C3058) and/or participating Special Education Local Plan Areas (SELPAS) or districts to provide technical assistance in their integration efforts for students who experience severe disabilities. The opinions expressed by these individuals do not necessarily represent those of the U. S. Department of Education, or the California Department of Education and no official endorsement should be inferred.

PEERS PROJECT
Consultant Bank List

I. Parent Trainers/Providers of Technical Assistance in PEERS SELPAS

County/Region		
San Mateo Bay Coastal	1.	Laura Bliss, parent • Founding member, Families Creating Supported Living Options • Speaker on strategies for and benefits of maximum integration in school and life
Davis No. Central	2.	Linda Brooks • Parent, special education itinerant teacher • Designing and implementing inclusive education, outcomes of an inclusive program
Napa Bay Coastal	3.	Marian Chappelle, foster parent • C.A.C. member, Napa • Ability awareness training and facilitation at school site level
Santa Barbara Southern	4.	Connie Lapin, parent • Special Education Advisory Commission Member • State LRE Task Force Member • Presentations on integration and advocacy to support inclusion; positive behavior support, facilitated communication
Santa Barbara Southern	5.	Louise MacKenzie, parent, Santa Barbara, Sped • Advocacy for full inclusion • Planning for inclusion
Yolo No. Central Region	6.	Bonnie Mintun, parent • Training in area of full inclusion with Davis, CA team across students experiencing range of severe disabilities; community building, curricular adaptation

Consultants

County/Region		
Solano Bay/Coastal	7.	Rita Norris, parent • Ability awareness education facilitator • Extra curricular integration with recreation departments
Colusa No. Central	8.	Debra Owens, parent and Director of Special Ed, SELPA Director, Colusa County • Training, T.A. on models for inclusion across all ages: rationale, structure, rural focus
Napa Bay/Coastal	9.	Patti Saunders, foster parent • C.A.C. member, Napa • Ability awareness training and facilitation at school site level
Santa Cruz Bay Coastal	10.	Carole and Dan Schwarzbach, parents • Designing and implementing inclusive education, rationale and outcomes
Oakland (Alameda County) Bay Coastal	11.	Gary Sjoberg, parent • Former Community Advisory Council Chairperson in Oakland U.S.D. • Training and information on grass roots efforts to initiate and support inclusion
Alameda Bay Coastal	12.	Don Vesey, parent • State Special Ed Advisory Commission Member • Speaker on integration strategies for students with multiple , severe disabilities
Contra Costa Bay Coastal Region	13.	Linda Wurzbach, parent • Board of Education Trustee San Ramon U.S. D. • Former parent specialist, C.D.E. • Lecturer St. Mary's College

II. Special Education Administrators

County/Region		
No. Coastal (San Diego) Southern	1.	Mike Byrne, SELPA Director No. Coastal. PEERS SELPA. multi district (surburban) some inclusive options developing
Lassen No Central	2.	Michael Justice, SELPA Director Lassen C.O.E. PEERS SELPA with rural inclusive model Waiver process for utilizing special class unit in itinerant manner; data on inclusive model
Yolo No Central	3.	Tom Kearns, Yolo C.O.E. Special Education Director. Inclusive county-operated model with Davis Unified School District
Alameda Bay Coastal	4.	Vivian Lura, (former) Director of Special Education, Oakland Public Schools 1988-1991. Principal, Cleveland Elementary School October 91. Present Member, State LRE Task Force. PEERS SELPA; major metropolitan district with significant systems change for integration.
Colusa No. Central	5.	Debra Owens, SELPA Director, Colusa. Parent, Director in fully inclusive county participating in PEERS.
North Coastal	6.	Gayle Patterson, Program Specialist • Planning for integration • Curriculum adaptation • Facilitation
Santa Cruz Bay Coastal	7.	Valerie Pitts-Conway, SELPA Director, No. Santa Cruz; Healthy Start Director, Regional Program; previous special education administrator in county offering inclusive options

County/Region		
Napa Bay Coastal	8.	a) Nancy Reinke, Program Administrator, NAPA U.S.D. in PEERS SELPA with no segregated programs and inclusive options at kindergarten and elementary levels. (707) 252-6865 b) Anne Kuscher, Preschools program administrator, Headstart and special education integration (707) 253-6850
San Diego Southern	9.	a) Terry Scott, Program Administrator San Diego City Schools. PEERS SELPA with major focus on integration systems change and inclusion in urban settings preschool - secondary levels b) Mary Sue Glynn - San Diego Preschool Administrator
San Diego Southern	10.	Dru Stainback, Professor, San Diego State University. Former SELPA Director, El Cajon. State LRE Task Force member, administrative training expertise across general and special education
L.A. Southern	11.	Dick Stiavelli, SELPA Director Long Beach Unified; state LRE Task Force, PEERS SELPA (213) 436-9931

III. General Educators

A. Administrators/Board of Education

County/ Region		
Yolo Davis No. Central	1.	Bob Buckley, former Board of Education Member, Professor, U.C. Davis
Lassen No. Central	2.	Dave Burriel, Principal McKinley Elementary School, Susanville, CA

County/ Region		
Kings No. Central	3.	Mike Cawley, Principal LeMoore High School, LeMoore,CA
Sacramento No. Central	4.	Tom Gemma, Principal Will Rogers Intermediate, San Juan U.S.D., CA
Colusa No. Central	5.	Anthony Katsaris, Principal Williams Elementary, Williams, CA
San Diego Southern Region	6.	Steve Ludwizcak, Principal Solana Vista, Solana Beach, CA
Alameda Bay Coastal	7.	Vivian Lura, Principal Cleveland Elementary School, Oakland (Former Special Education Director) See II.
Colusa No. Central	8.	Jim Lutz, Principal Colusa High School, Colusa, CA
Yolo No. Central	9.	Dave Madrigal, Principal North Davis Elementary School, Davis, CA
Alameda Bay Coastal	10.	Russ Peterson, Principal McKinley elementary School, San Leandro, CA
Sacramento No. Central	11.	Roger Riley, Principal San Juan High School
Santa Cruz Bay Coastal	12.	Paula Simmons, Principal Quail Hollow Elem School, San Lorenzo Valley, USD
Alameda Bay Coastal	13.	Steve Stevens, Principal Allendale Elementary School, Oakland, CA

B. Teachers

County/Region		
Napa Bay Coastal	1.	Lauri Gistelli 3rd Grade teacher, Shearer School, Napa, CA
Colusa No. Central	2.	Jody Johnson Egling Middle School Colusa, CA
Santa Cruz Bay Coastal	3.	Pat Mintun, 2nd grade teacher Quail Hollow Elementary BenLomond CA
Yolo No. Central	4.	Louise Zabriskie 2nd Grade Teacher, Davis, CA

IV. Special Education Teachers, Support Staff, University Personnel

County/Region		
Alameda Bay Coastal	1.	Corinne Agurkis, Inclusive education teacher Christiansen Elementary, Livermore, CA
Alameda and statewide	2.	Jacki Anderson, Ph.D. California State University Hayward Inclusion, integrated related services, non aversive, community-referenced behavior management
San Diego Southern	3.	Katie Bishop, Ph.D. University of San Diego Community referenced positive behavioral support
Yolo No. Central	4.	Linda Brooks, Inclusive education teacher Davis (three elementary schools)
San Francisco and Bay Area	5.	Kathy Doering, Natural Supports Project and Transition San Francisco State University

County/Region		
San Francisco and Bay Area	6.	Kathleen Gee, Active Interactions Project Integration of students with multiple, severe disabilities San Francisco State University
Los Angeles Southern	7.	Marquita Grenot - Scheyer, Ph.D. California State University Long Beach Inclusion, friendship development, curricular adaptation
San Diego/ Southern	* 8.	Dave Hall, Integration special teacher Poway High School, Poway CA
San Francisco Bay/ Coastal	9.	Pam Hunt, Ph.D. Research Coordinator, CRI, teacher trainer ,San Francisco State University. Research and evaluation of integrated programs inservice and preservice training on instructional strategies and curriculum, alternative and augmentative communication systems
San Diego Southern	* 10.	Kimberlee Jubala, Former special education teacher; now general education San Diego - Lafayette
Alameda Bay Coastal	11.	Heather Kaney School Psychologist, Hoover Elementary School Oakland U.S.D. Team building, training, facilitation
San Francisco Bay Coastal	12.	Tricia Karasoff, Ph.D. Coordinator, California Research Institute, and Partnership grant, SFSU Systems change and integration, administrative issues, coordinated service delivery, Medicaid School provide issues.
Alameda Bay/Coastal	* 13.	April Kilstrom, Inclusive education teacher Tilden Preschool Oakland, CA

County/Region			
San Francisco & Orange Counties Bay Coastal/ Couthern		14.	Mellanie Lee, Steve Zivolich Integrated Work Project, Integrated Resources Natural Supports Project San Francisco State University
No. Central	*	15.	Kandis Lighthall, Integration special education teacher Monte Vista School, Redding, CA
Placer No. Central	*	16.	Paula MacNeill Speech and language; integrated therapy
Solano Bay Coastal		17.	Dan and Stacy Martin Occupational and Physical therapy; integrated related service delivery and transdisciplinary teams Solano County
Alameda Bay Coastal	x	18.	Kelly McGrath, inclusive education teacher Allendale Elementary, Oakland, CA
Placer No. Central	*	19.	Dona Meinders, Edwin Markham Middle school, Placerville
Colusa No. Central	*	20.	Kim Morris, Inclusive education teacher Williams Elementary School
San Diego and statewide		21.	Ian Pumpian, Ph.D. San Diego State University Inclusion, integrated employment, transitions
Alameda Bay Coastal	x	22.	Michele Raley, Integration special education teacher San Leandro High School, San Leandro, CA
Alameda Bay Coastal	x	23.	Gwen Smith, Integration special education teacher Washington Elementary School, San Leandro, CA

County/Region		
San Diego Southern	24.	Louise Supnick and Debbie Tweit, Integration adaptations and curricular modification San Diego State University, San Diego, CA
Alameda Bay Coastal	* 25.	Lauri Truilzi, Morgen Alwell, Inclusive education elementary teachers John Muir Elementary, Berkeley U.S.D., CA
Fresno No. Central	* 26.	Karen Von Felton, Integration teacher Fresno State University, Fresno, CA

X - California State University Hayward model demonstration training site.
Contact Dr. Jacki Anderson (510) 881-3332 or
Dr. Ann Halvorsen (510) 881-3087.

* - State implementation/demonstration site also used by TRCCI, Training and Resources for Community and Curricular Integration, CDE's inservice training unit in the "SH" area. Implementation Sites Manager for PEERS, TRCCI and Deaf Blind Services is Renee Gorevin (916) 641-5930.

Appendix F

CRI

Technical Assistance Guide

EFFECTIVE PRACTICES FOR INCLUSIVE PROGRAMS: A TECHNICAL ASSISTANCE PLANNING GUIDE

Marlene Simon
Patricia Karasoff
California Research Institute*
San Francisco State University

&

Anne Smith
United States Department of Education
Office of Special Education Programs

With Contributions From:

Ann Halvorsen
California State University, Hayward

Tom Neary
California State University, Sacramento

PEERS Project
California State Department of Education

December, 1992

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Introduction

A major focus of education reform efforts designed to improve outcomes for students with disabilities has been on developing and implementing inclusive education programs. Inclusive programs provide educational and related services to support students with disabilities in all aspects of school and community life. This includes supporting students with disabilities as they interact with nondisabled peers to fully participate in general education and extracurricular activities. Inclusive education programs require that general educators, special educators, parents, students, and related service providers collaborate to develop and implement innovative strategies to accommodate diverse student needs in typical environments. These inclusive arrangements often present technical assistance challenges in terms of state and district level policy development, school organizational structure, curriculum development, program planning and implementation, and professional practices.

For the past decade, the two types of program models that have dominated reform efforts have included integrated education models and inclusive education models. Initial reform efforts were directed at the movement of students with severe disabilities from separate day schools or residential facilities to separate special education classes in regular schools. In the early stages of these reform efforts students typically received the majority of their instructional day in separate special education classes within the general education school and only minimally interacted with their nondisabled peers (e.g., at lunch, during recess, in the hallways, school assemblies). As educators observed the many benefits of these student interactions and research provided evidence to confirm their observations (Halvorsen & Sailor, 1990; Madden & Slavin, 1983), support increased for having students with disabilities spend at least part of their instructional day in the general education classroom. These initial experiences with integrated education have produced inclusive education models which fully included students with severe disabilities in general education classes and other age-appropriate settings. Sailor (1991) lists a number of elements common to full inclusion models:

1. All students attend the school to which they would go if they had no disability.

2. A natural proportion (i.e., representative of the school district at large) of students with disabilities occurs at any school site.

3. A zero-rejection philosophy exists so that no student would be excluded on the basis of type or extent of disability.

4. School and general education placements are age-and-grade-appropriate, with no self-contained special education classes operative at the school site.

5. Effective instructional practices such as cooperative learning and peer instructional methods receive significant use in general instructional practice at the school site.

6. Special education supports are provided within the context of the general education class and in other integrated environments (i.e., community and vocational settings, cafeteria, library, etc.).

The essential difference between the two types of approaches is in the use of separate special education classes. Both approaches emphasize placing students with disabilities in the age-appropriate schools they would attend if they were not disabled. Each emphasizes maintaining a natural proportion of students with disabilities at the school site. In addition, each stresses facilitating student interaction with nondisabled peers with approaches such as cooperative learning, peer instruction, and special friends programs. However, a critical difference between these two approaches is that in the integrated model part of the student's day is spent in a special education classroom; this is not the case for inclusive models. In inclusive models students are members of their general education class. Inclusive models also place greater emphasis on using collaborative group decision-making procedures to create learning opportunities for students.

There is strong evidence to suggest that when general education classes and other typical environments are modified to meet the needs of students with disabilities, they make significantly more gains in these placements than in pull-out programs or in other more segregated placements (Madden & Slavin, 1983; Wang & Birch, 1984). In an extensive review of the research on the effects of integrated educational placements for students with severe disabilities, Halvorsen and Sailor (1990) report that such placements were associated with a number of positive outcomes including increased social development, increased interactive behavior, enhanced skill acquisition and generalization, increased health and independence, greater success in meeting IEP objectives, more positive attitudes on the part of nondisabled peers and others in the community, and more normalized adult functioning. Similar studies on the effects of such placements for students with mild disabilities have found that they result in higher academic achievement (Deno, Maruyama, Espin, & Cohen, 1990; Leinhardt, 1980) and greater social-emotional growth (Madden & Slavin, 1983). Recent research suggests the greater the extent to which students with disabilities are included in general education classrooms and other age-appropriate environments, the more likely they are to have positive outcomes (Hunt, Farron-Davis, Staub, Beckstead, Curtis, Karasoff, Sailor, 1992).

In short, we know that well developed inclusive education programs can increase the effectiveness of special education services and supports to improve outcomes for students with disabilities. An extensive knowledge base provides a strong rationale for changing educational systems to support students with disabilities in inclusive environments. However, beginning the change process is one of the greatest challenges currently facing educational systems at the state, district, and building level. Some schools and education agencies are beginning the change process by developing integrated educational programs at neighborhood or "home" schools. If a state, district, or school site chooses to proceed in this manner, we would encourage them to view this as a first step in an overall change strategy designed to ultimately lead to the development of inclusive educational programs. Others are omitting the intermediate step and are developing inclusive programs from the onset of their commitment.

This technical assistance planning guide emphasizes building the capacity of states, school districts, and school sites to provide quality educational programs to students with disabilities in integrated and inclusive environments by providing a framework for developing technical assistance activities. The guide facilitates planned educational change with a focus on local ownership and provides self-assessment checklists to examine whether effective practices are implemented at the state, district, and school site levels. It also suggests resources and strategies for use in planning technical assistance activities.

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Sailor, W. (1991). Special education in the restructured school. Remedial and Special Education, 12(6), 8-22.

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Organization and Use of the Guide

This technical assistance guide is designed to support change strategies at multiple levels by providing a framework for developing technical assistance activities at state, district, and building levels. Therefore, the guide is organized into three sections (i.e., state level practices, district level practices, and building level practices) to address planning needs. Each section includes a checklist of effective practices, a listing of corresponding change strategies, and identifies resources to assist educational programs in developing, adopting and implementing these practices. In addition, each section contains a table which cross references strategies and resources to specific effective practices.

This guide has been constructed with a bottom-up, grass roots change focus rather than a top-down orientation for organizing and planning school reform. Practices at the state and district level focus primarily on issues related to leadership, support, and program planning. While practices at the building level also address leadership, support, and program planning, greater emphasis is placed on the *how to* of providing services to students in inclusive environments. Practices at the building level are divided into three major subgroups: 1) leadership and support; 2) program planning and implementation; and 3) student inclusion. The leadership and support section emphasizes developing a school mission or philosophy to support inclusion and outlines effective practices related to administrative responsibilities and staff supervision. The program planning and implementation section focuses on IEP development, collaborative teamwork, and professional practices. The student inclusion section identifies effective practices for including students with disabilities in general education classes and extracurricular activities. In addition, this component addresses practices to facilitate the development of social relationships between students with disabilities and their nondisabled peers.

The practices suggested in this guide should be incorporated into existing state, district, and building level school improvement initiatives. For example, many schools have established school improvement committees that can serve as excellent vehicles for inclusion planning. In addition, aspects of inclusive education responsibilities can be incorporated into existing staff evaluation procedures.

Many people working at different levels (state, district, and school site) play critical roles in establishing and maintaining inclusive programs. This guide is intended for use by a variety of individuals in a number of ways:

- Family members make a vital contribution to inclusive programs; not only in the planning and design of their child's educational program, but also by advocating for inclusion at the building, district, and state levels. Families can use the guide as a foundation for effective advocacy and leadership by developing and planning inclusive educational programs at state and local levels, planning parent training activities, and planning community awareness activities to generate grass roots support and advocacy for inclusion.

- Teachers and instructional support staff with skills to support students in typical settings are critical to the success of inclusive programs. This guide contains strategies and resources for adapting curriculum, materials, and environments as well as collaborative teamwork, functional assessment, instruction of functional activities, and IEP development.

- Related service providers can use the guide to focus on providing therapeutic interventions that are embedded into the student's daily school routine and in other inclusive environments. They may want to concentrate on strategies and resources for practices regarding functional assessment, instruction of functional activities, and collaborative teamwork.

- Building administrators can use the guide to help instructional planning teams solve programmatic issues by identifying building-based and student-centered technical assistance resources.

- Local school district administration can use the guide to promote inclusion through effective leadership, supportive policies, and restructuring or expanding existing systems (i.e., transportation, personnel evaluation program). Central office technical assistance providers can use this guide to tailor their activities to individual school sites and instructional planning teams as well as to plan district-wide inservice training on specific topics.

- State education agencies can use the guide to focus on critical leadership activities to support and facilitate the change process for local education agencies by developing state policies and practices that support inclusion.

Suggested Process for Using the Guide

Step One:

Select and complete an **effective practice needs assessment checklist** from Appendix A for state level, district level, or building level planning. For building level planning, you may elect to narrow your focus by completing only a subgroup of the section (i.e., IEP Development). However, some strategies and resources complement more than one practice. By completing all sections of the building level checklist, you will be able to determine where specific strategies and resources will meet technical assistance needs across multiple areas. This can be helpful in making judicious use of training and staff development resources.

Step Two:

Following completion of the needs assessment checklist, determine which practices to focus on for technical assistance activities. The **technical assistance planning forms** in Appendix B can be used to record the practices you plan to focus on. Some technical assistance planners may want to address each practice identified as a need in some manner, while others may want to prioritize these practices and work on a few at a time.

Step Three:

After selecting the practices targeted for technical assistance activities, turn to the section of the guide which outlines state, district, or building level **effective practices and supportive strategies** (State Level - page 17, District Level - page 23, and Building Level - page 36). Identify the strategies you plan to implement and record them on the technical assistance planning form. Then, list the specific actions that must occur in order to implement each strategy. Assign a planning team member to be responsible for each action and determine a target dates for completion. The planning team members can use the **resource planning guides** (State level - page 20, District Level - page 28, and Building Level - page 55) as needed to complete actions.

Step Four:

The planning team should meet at regular intervals to discuss issues and progress on implementing the plan and to make required modifications. The planning team may also use the checklist at selected intervals to evaluate and document progress in implementing effective inclusive practices.

As suggested earlier, education agencies are unique entities and cannot be expected to approach change in the same manner. Thus, each educational agency and school site will need to adapt the ideas presented here to meet their unique needs.

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EFFECTIVE PRACTICES: SUPPORTIVE RESEARCH AND LITERATURE

This section provides citations for the research and literature on best practices for inclusive programs that provide a supportive rationale for the practices outlined in the effective practice checklists found in Appendix A. The full reference listing can be found in the Resources Section which begins on page 63.

State Level Practices

1. **The state develops and disseminates a mission statement which reflects the philosophy that all children can learn and considers the local school accountable for serving all students[1]** *(Hamre-Nietupski, Nietupski, & Maurer, 1990); Karasoff, 1991).*
2. **The state develops policies that facilitate district implementation of inclusive programs and eliminates policies that serve as disincentives** *(Hamre-Nietupski, Nietupski, & Maurer, 1990; Karasoff, 1991; Wilson, 1989).*
3. **The state increases the awareness, knowledge, and adoption of best practices for inclusive educational programs[2]** *(Karasoff, 1991; Wilson, 1989).*
4. **The state promotes district implementation of inclusive programs** *(Hamre-Nietupski, Nietupski, & Maurer, 1990; Karasoff, 1991; Wilson, 1989).*
5. **The state evaluates inclusive programs and practice to assess the impact of state policies annually** *(Hamre-Nietupski, Nietupski, & Maurer, 1990; Karasoff, 1991).*

District Level Practices

1. **The district develops and disseminates a mission statement which reflects the philosophy that all children can learn and the local school is accountable for serving all students[1]** *(Freagon, Keiser, Kincaid, Usilton, & Smith, 1992; Karasoff, 1991; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*
2. **The district facilitates locally owned change at the school site by providing policies and procedures that support building level implementation** *(Karasoff, 1991; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Wilcox, Ryndak, Butterworth, Eberhard, Kronberg, Panzer, Passenger, Peel, Ramsey, & Steveley, 1989; Wilson, 1989).*
3. **The district promotes awareness, knowledge, and adoption of best practices for inclusive programs and the continual updating of these services by seeking inservice training and consultation on an ongoing basis[2]** *(Halvorsen & Sailor, 1990; Karasoff, 1991; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Wilson, 1989).*

4. All school buildings are accessible to students with disabilities served by the district and to other individuals with disabilities in the community who may be employed in or visit these sites[3] *(Freagon, Keiser, Kincaid, Usilton, & Smith, 1992).*

5. Students with and without disabilities wait at school bus stops together and ride to and from school on the same bus[3] *(Freagon, Keiser, Kincaid, Usilton, & Smith, 1992; Meyer, Eichinger, & Park-Lee, 1987).*

6. Inclusive programs have been established at each school site and students with disabilities are members of age-appropriate (+/- 1yr.) general education classrooms in the same schools they would attend if they were non-disabled[4] *(Brown, Long, Udvari-Solner, Davis, VanDeventer, Ahlgren, Johnson, Gruenewald, & Jorgensen, 1988; Falvey, 1989; McDonnell, Hardman, Hightower, & Keifer-O'Donnell, 1991; Meyer, Eichinger, & Park-Lee, 1987; Meyer & Kishi, 1985; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Stainback, Stainback, & Forest, 1989).*

7. Coordinated transition programs for younger and older students have been established (i.e. preschool -> elementary -> MS/Jr. high -> HS -> post-secondary)[4] *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

8. School personnel evaluation criteria includes a standard on the inclusion of all students with disabilities into all aspects of the school community[3] *(Freagon, Keiser, Kincaid, Usilton, & Smith, 1992).*

9. The district incorporates aspects of inclusive practices into its annual district-wide program evaluation activity *(Freagon, Keiser, Kincaid, Usilton, & Smith, 1992; Karasoff, 1991).*

Building Level Practices[4]

LEADERSHIP AND SUPPORT

Part 1: School Mission/Philosophy

1.1 The school develops and disseminates a mission statement which reflects the philosophy that all children can learn and the school is responsible for serving them[1] *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

1.2 The school philosophy emphasizes responsiveness to families and encourages active family involvement[1] *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

1.3 The school philosophy supports the need for ongoing inservice training, staff development, and technical assistance[1] *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

Part 2: Administrative Responsibilities & Staff Supervision

2.1 The principal is ultimately responsible for program implementation including staff supervision and evaluation. *(Bogdan & Biklen, 1985; Brinker & Thorpe, 1986; Halvorsen & Sailor, 1990; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

2.2 Special and general education teachers are responsible for:
- **Attending faculty meetings.**
- **Participating in supervisory duties (e.g., lunch/bus/yard duty).**
- **Participating in extracurricular activities (e.g., chaperon dances, work with student clubs).**
- **Following school protocol by keeping principal or appropriate administrator informed on an ongoing basis.**

(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Taylor, 1982).

2.3 There is an ongoing process to support staff in implementing inclusive practices (i.e., time for team planning meetings, opportunities for staff development) *(Halvorsen, Smithey, & Neary, 1992).*

PROGRAM PLANNING AND IMPLEMENTATION

Part 3: IEP Development

3.1 Instructional staff and related service providers complete a functional assessment as an initial step in IEP development *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Wilcox, Ryndak, Butterworth, Eberhard, Kronberg, Panzer, Passenger, Peel, Ramsey, & Steveley, 1989).*

3.2 Activity-based evaluations of student interests and family priorities are part of the functional assessment *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Wilcox, Ryndak, Butterworth, Eberhard, Kronberg, Panzer, Passenger, Peel, Ramsey, & Steveley, 1989).*

3.3 Student programs are developed across the following curricular content areas:
- **Communication/Socialization**
- **Personal Management (includes Self Determination)**
- **Recreation/Leisure**
- **Home/Domestic**
- **General Education/Academic**
- **Transition/Vocational**

(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).

3.4 **Parents, general and special education teachers, related service personnel, and students collaborate to write joint IEP goals and objectives** *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Wilcox, Ryndak, Butterworth, Eberhard, Kronberg, Panzer, Passenger, Peel, Ramsey, & Steveley, 1989).*

3.5 **IEPs include personal management objectives to promote student self-advocacy (i.e., decision-making, choice-making, individual responsibility)[1]** *(Meyer, Eichinger, & Park-Lee, 1987).*

3.6 **IEP objectives are developed with families and reflect family priorities** *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

3.7 **Student IEPs include instruction of functional activities in age-appropriate school and community settings** *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

3.8 **IEP objectives reflect interaction with nondisabled peers** *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

3.9 **IEPs for students age 14 and older include objectives that address skills and services needed to support transition to adult roles** *(Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Wilcox, Ryndak, Butterworth, Eberhard, Kronberg, Panzer, Passenger, Peel, Ramsey, & Steveley, 1989).*

3.10 **IEP teams use natural proportion guidelines when serving students with disabilities in general education classrooms** *(Halvorsen & Sailor, 1990; Meyer & Kishi, 1985; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

3.11 **The supports, aids, curricular modifications and other instructional methods required for the student to be successful in school and community settings are discussed during IEP meetings using a transdisciplinary approach[3]** *(Brophy & Good, 1986; Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Wilcox, Ryndak, Butterworth, Eberhard, Kronberg, Panzer, Passenger, Peel, Ramsey, & Steveley, 1989).*

3.12 **The supports, aids, curricular modifications, and other instructional methods outlined in the IEP are implemented and updated according to the student's progress[3]** *(Brophy & Good, 1986; Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Wilcox, Ryndak, Butterworth, Eberhard, Kronberg, Panzer, Passenger, Peel, Ramsey, & Steveley, 1989).*

Part 4: Collaborative Teamwork

4.1 **Teams meet weekly to plan instructional support services for all students** *(Freagon, Keiser, Kincaid, Usilton, & Smith, 1992).*

4.2 **The team collaborates to: 1) develop peer network/interactive systems; 2) adapt learning objectives for students within the context of the core curriculum; 3) make materials and environmental adaptations; and 4) provide physical assistance as needed** *(Halvorsen & Sailor, 1990; Meyer & Kishi, 1985; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

4.3 **Teams collaborate to provide related services in inclusive settings** *(Halvorsen & Sailor, 1990; McDonnell & Hardman, 1989; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

4.4 **Teams initiate systematic transition planning to support successful transition from one program to another** *(Gaylord-Ross, 1989; Halvorsen & Sailor, 1990; Meyer & Kishi, 1985; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

4.5 **Team members meet informally with one another to discuss ongoing inclusion issues and maintain continuous communication** *(Halvorsen & Sailor, 1990; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

4.6 **Teams assist families in accessing community resources** *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

Part 5: Professional Practices

5.1 **All instructional staff work with students in age-appropriate general education and community settings** *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

5.2 **Related services staff provide services in general education classrooms and in community settings using transdisciplinary and consultative approaches** *(Halvorsen & Sailor, 1990; McDonnell & Hardman, 1989; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

5.3 **Instructional staff and related service providers develop adaptations for individual students to facilitate independence across environments** *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

5.4 **Instructional staff plan activities using materials, instructional procedures and environments that are age-appropriate and individualized** *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

5.5 Instructional staff adapt the general education curriculum to address academic and/or community-referenced content areas to meet IEP objectives *(Freagon, Keiser, Kincaid, Usilton, & Smith, 1992; Halvorsen & Sailor, 1990; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

5.6 Instructional staff incorporate ability awareness into general education curriculum on diversity and the human experience *(Hamre-Nietupski, Ayres, Nietupski, Savage, Mitchell, & Bramman, 1989; Murray, 1983; Taylor 1992).*

5.7 Instructional staff and related service providers ensure interaction with nondisabled peers in all activities *(Halvorsen, Smithey, & Neary, 1992; Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987).*

5.8 Instructional staff implement positive behavior management strategies that utilize natural cues/corrections with support from related services personnel and other team members *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

5.9 Instructional staff demonstrate positive attitudes towards and age-appropriate interactions with all students *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).*

STUDENT INCLUSION

Part 6: Student Activities

6.1 Students have access to all school environments for instruction and interactions *(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Taylor, 1982).*

6.2 Students participate in and are included in activities such as:

- **music**
- **art**
- **library**
- **gym**
- **lunch**
- **assemblies**
- **clubs**
- **general education classes**
- **home economics**
- **work experience**
- **recess/break**
- **computer use**
- **graduation exercises**
- **field trips**

(Halvorsen & Sailor, 1990; Meyer, Eichinger, & Park-Lee, 1987; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Taylor, 1982).

6.3 Students with disabilities are involved in extracurricular school activities such as:

- **clubs**
- **dances**
- **after school recreation/day care programs**
- **scouts**

(Meyer, Eichinger, & Park-Lee, 1987)

Part 7: Interaction with Peers

7.1 Students' instructional programs incorporate interaction with nondisabled students in the following areas:

- **Communication/Socialization**
- **Personal Management (includes Self Determination)**
- **Recreation/Leisure**
- **Home/Domestic**
- **General Education/Academic**
- **Transition/Vocational**

(Halvorsen & Sailor, 1990; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989).

7.2 Students are involved with age-appropriate, nondisabled peers in structured interaction programs such as:

- **Peer tutoring in school and community environments**
- **"PALS" (Partners at Lunch) or lunch buddies**
- **Circle of Friends**
- **Co-worker support at job training site**
- **MAPS**

(Halvorsen & Sailor, 1990; McDonnell & Hardman, 1989; Meyer, Eichinger, & Park-Lee, 1987; Murray, 1983; Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz, 1989; Taylor, 1982).

7.3 Social interaction programs are:

- **Well organized**
- **Positive in orientation (emphasizing students' strengths, focusing on functional activities)**
- **Well-attended**
- **Supported by principal, faculty, and parents**
- **Viewed as a positive experience by students**

(Halvorsen, Smithey, & Neary, 1992).

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1. These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

2. These effective practice items have been taken or adapted from: Karasoff, P. (1991). Strategies (Bulletin), 2(2). San Francisco, CA: San Francisco State University, California Research Institute.

3. These effective practice items have been taken or adapted from: Freagon, S., Keiser, N., Kincaid, M., Usilton, R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illinois State Board of Education, Project CHOICES/Early CHOICES, S.A.S.E.D.

4. These effective practice items have been taken or adapted from: Halvorsen, A., Smithey, L., & Neary, T. (1992). Implementation site criteria for inclusive programs. Sacramento, CA: California State Department of Education, PEERS Project.

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EFFECTIVE PRACTICE CHECKLIST - STATE LEVEL

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
1. The state develops and disseminates a mission statement which reflects the philosophy that all children can learn and considers the local school accountable for serving all students.[1]				
2. The state develops policies that facilitate district implementation of inclusive programs and eliminates policies that serve as disincentives.				
3. The state increases the awareness, knowledge, and adoption of best practices for inclusive educational programs.[2]				
4. The state promotes district implementation of inclusive programs.				
5. The state evaluates inclusive programs and practice to assess the impact of state policies annually.				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

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1. These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

2. These effective practice items have been taken or adapted from: Karasoff, P. (1991). Strategies (Bulletin), 2(2). San Francisco, CA: San Francisco State University, California Research Institute.

3. These effective practice items have been taken or adapted from: Karasoff, P. Alwell, M., & Halvorsen, A. (1992). Systems change: A review of effective practices. Unpublished manuscript. San Francisco State University, California Research Institute.

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EFFECTIVE STATE PRACTICES AND SUPPORTIVE STRATEGIES

1. **Practice: The state develops and disseminates a mission statement which reflects the philosophy that all children can learn and considers the local school accountable for serving all students.[1]**

   Strategies:

   Form a broad-based inclusion task force with key stakeholders and agency representation to collaborate on the change process.

   Develop a shared vision for change and inclusion based on desired student outcomes.

   Develop the mission statement incorporating the following components: a definition of inclusion, a rationale for implementing inclusive educational programs, a belief or vision statement, a brief outline of administrative policies that support inclusive practice, and recommended strategies and procedures for implementation.

2. **Practice: The state develops policies that facilitate district implementation of inclusive programs and eliminates policies that serve as disincentives. [3]**

   Strategies:

   Modify or develop state education policy to support change (i.e., eliminate budgetary disincentives for inclusion; offer school districts grants or other budgetary support).

   Review teacher certification requirements and modifiy as needed.

   Develop and adopt state best practice programmatic guidelines.

   Modify service delivery structure and resource allocations.

   Provide leadership on state task forces to promote inclusion.

3. **Practice: The state increases the awareness, knowledge, and adoption of best practices for inclusive educational programs.[3]**

   Strategies:

   Provide leadership training.

   Conduct summer institutes.

   Provide regionalized best practice forums.

Develop content specific training modules in collaboration with institutes of higher education and school district personnel.

Collaborate with institutes of higher education to develop coursework for preservice and inservice personnel preparation.

Utilize regionalized approach for delivery of inservice training.

Utilize trainer of trainers approach for wide dissemination.

Establish regional demonstration/implementation sites.

Identify and attend summer institutes within and outside the state and then share that information with all school districts.

Facilitate networking across the state among parents, school districts, institutes of higher education, and advocacy organizations.

Maintain momentum of knowledge of best practice: promote conference attendance; present at local, state, and national conferences; develop co-presentations with local sites; develop manuals, videotapes, newsletters, articles, etc.; and conduct statewide and districtwide mailings.

4. Practice: **The state promotes district implementation of inclusive programs.**[3]

Strategies:

Guide school districts in developing a shared vision for change and inclusion based on desired student outcomes.

Assist school districts in conducting an inclusion needs assessment and developing an implementation plan to promote adoption of best practice.

Facilitate the development of clear and consistent technical assistance goals and objectives to support the implementation plan.

5. **Practice: The state evaluates inclusive programs and practice to assess the impact of state policies annually.**

Strategies:

Monitor and evaluate state and local policy changes, the number of state agency waiver requests, and the state compliance review process and findings.

Review child count data on the number of students moved into age-appropriate inclusive environments each year.

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RESOURCE PLANNING GUIDE - STATE LEVEL

Several resources are provided for each of the following practices. These are listed in the Resources section (page 62) of this planning guide and can be located by reference number.

Effective Practices	Nos. 1-49	Nos. 50-99	Nos. 100-149	Nos. 150-199	Nos. 200-249	Nos. 250-299	Nos. 300-349	Nos. 350-406
1. The state develops and disseminates a mission statement which reflects the philosophy that all children can learn and considers the local school accountable for serving all students.[1]	20 21 22 34			184 185 194a	216 225 243	280 289 290 292 293 295	305 306 307 322 323 324 337 344	377
2. The state develops policies that facilitate district implementation of inclusive programs and eliminates policies that serve as disincentives.	26 34 49			152 164 187 194a	243	254 290 293 294 295		370 371
3. The state increases the awareness, knowledge, and adoption of best practices for inclusive educational programs.[2]	20 21 22 49			194a 199		254	313 333 334	
4. The state promotes district implementation of inclusive programs.	20 21 22 34	68 96		186 187 194a		277	313 324 334 338	370
5. The state evaluates inclusive programs and practice to assess the impact of state policies annually.				183 194a		267 268 269 270		

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1. These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

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EFFECTIVE PRACTICE CHECKLIST - DISTRICT LEVEL

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
1. The district develops and disseminates a mission statement which reflects the philosophy that all children can learn and the local school is accountable for serving all students.[1,5]				
2. The district facilitates locally owned change at the school site by providing policies and procedures that support building level implementation.[5]				
3. The district promotes awareness, knowledge, and adoption of best practices for inclusive programs and the continual updating of these services by seeking inservice training and consultation on an ongoing basis.[2,5]				
4. All school buildings are accessible to students with disabilities served by the district and to other individuals with disabilities in the community who may be employed in or visit these sites.[3]				
5. Students with and without disabilities wait at school bus stops together and ride to and from school on the same bus.[3]				
6. Inclusive programs have been established at each school site and students with disabilities are members of age-appropriate (+/- 1yr.) general education classrooms in the same schools they would attend if they were non-disabled.[4]				
7. Coordinated transition programs for younger and older students have been established (i.e. preschool --> elementary --> MS/Jr. high --> HS --> post-secondary).[4]				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

EFFECTIVE PRACTICE CHECKLIST - DISTRICT LEVEL

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
8. School personnel evaluation criteria includes a standard on the inclusion of all students with disabilities into all aspects of the school community.[3]				
9. The district incorporates aspects of inclusive practices into its annual district-wide program evaluation activity.[5]				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

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[1] These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

[2] These effective practice items have been taken or adapted from: Karasoff, P. (1991). Strategies (Bulletin), 2(2). San Francisco, CA: San Francisco State University, California Research Institute.

[3] These effective practice items have been taken or adapted from: Fasugna, S., Kaiser, N., Kincaid, M., Uellon, R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illinois State Board of Education, Project CHOICES/Early CHOICES, S.A.S.E.D.

[4] These effective practice items have been taken or adapted from: Halvorsen, A., Smithey, L., & Neary, T. (1992). Implementation site criteria for inclusive programs. Sacramento, CA: California State Department of Education, PEERS Project.

[5] These effective practice items have been taken or adapted from: Karasoff, P., Alwell, M., & Halvorsen, A. (1992). Systems change: A review of effective practices. Unpublished manuscript. San Francisco State University, California Research Institute.

EFFECTIVE DISTRICT PRACTICES AND SUPPORTIVE STRATEGIES

1. **Practice: The district develops and disseminates a mission statement which reflects the philosophy that all children can learn and the local school is accountable for serving all students.**[1,5]

   Strategies:

   Form a District Inclusion Task Force which includes representation from students, parents, teachers, parents, central office and school site administration, related services personnel, and the business community.

   Develop a shared vision for change and inclusion based on desired student outcomes.

   Develop the mission statement incorporating the following components: a definition of inclusion, a rationale for implementing inclusive educational programs, a belief or vision statement, a brief outline of administrative policies that support inclusive practice, and recommended strategies and procedures for implementation.

   Request that District Inclusion Task Force representatives disseminate the inclusion mission statement to their constituent groups.

2. **Practice: The district facilitates locally owned change at the school site by providing policies and procedures that support building level implementation.**[5]

   Strategies:

   Establish a district-wide advisory board which involves all of the key stakeholders.

   Inclusive education activities occur within the context of existing school planning procedures.

   Develop or utilize the existing district mission statement to anchor the goal of developing inclusive educational programs.

   Establish preschool through transition inclusive programs.

   Modify or develop policies that support change by ensuring that students with disabilities attend the same school they would attend if non-disabled and that they have the same calendar and hours.

   Modify service delivery structure and resource allocations.

   Modify job roles and descriptions.

Develop programmatic guidelines. For example, establish a district support team to develop a community-based instruction procedural guide (i.e., liability, training, transportation, fiscal issues, supervision).

Define service delivery plans and administrative responsibilities within the system (e.g., chain of command; who will supervise teachers and support staff, who do teachers report to, etc.) and disseminate to staff.

Develop building-based support teams composed of general and special educators and related services staff.

Provide ample opportunities for professional growth and district recognition.

3. Practice: **The district promotes awareness, knowledge, and adoption of best practices for inclusive programs and the continual updating of these services by seeking inservice training and consultation on an ongoing basis.**[2,5]

Strategies:

Promote conference attendance for parents, teachers, administrators, and school board members.

Provide awareness training within existing staff development and inservice training mechanisms.

Provide opportunities to teachers, parents, administrators, school board members, and other stakeholders to visit exemplary sites.

Provide leadership training for central office and school site administrators.

Develop content specific training modules.

Develop regional demonstration/implementation sites.

Conduct districtwide mailings to keep interested parents and professionals informed of inclusive program progress and upcoming events.

Present information in a variety of formats to a wide array of stakeholders.

Utilize trainer of trainers approach.

Utilize existing district information fairs to disseminate best practice information.

Promote visitations within and across district to share ideas and information.

Share resources such as videotapes, newsletters, and books.

Highlight the benefits of inclusive education for all students at open house/parents' night.

4. **Practice: All school buildings are accessible to students with disabilities served by the district and to other individuals with disabilities in the community who may be employed in or visit these sites.**[3]

   Strategies:

   Evaluate the accessibility of all sites.

   Work through district planning group to ensure that reasonable accommodations are in place.

   Develop a guide that outlines procedures to ensure safety.

5. **Practice: Students with and without disabilities wait at school bus stops together and ride to and from school on the same bus.**[3]

   Strategies:

   Involve transportation representation in all or part of inclusion planning.

   Determine transportation services according to student need, residence, and district transportation practices.

   Assess the level of transportation support needed by individual students.

   Provide individualized support and assistance for students on school buses if required.

6. **Practice: Inclusive programs have been established at each school site and students with disabilities are members of age-appropriate (+/- 1 year) general education classrooms in the same schools they would attend if they were non-disabled.**[4]

   Strategies:

   Form a broad-based inclusion task force with key stakeholders and agency representation to collaborate on the change process.

   Develop a district policy statement which includes a definition and rationale for inclusion as part of the district's overall improvement plan.

   Develop a written district and school site implementation plan for inclusive programs which addresses issues such as heterogeneity, non-catogorical grouping strategies, age-appropriateness of school, home/magnet schools, and geographic location.

   Compile information on attendance area for each student and begin returning students to home schools.

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Design student attendance procedures to address issues such as heterogeneity, age-appropriateness of school, home/magnet schools, and geographic location.

Develop a school site implementation plan for inclusive programs.

Develop plans and timelines for establishing inclusive programs across ages/school levels (elementary/middle school/high school/post secondary).

Review the organization and assignment of related service personnel to ensure that students receive the related services outlined in their IEPs.

Develop guidelines for the selection/assignment of teachers and paraprofessionals.

Develop a process for transition between classes and schools utilizing district and site school improvement committees.

Ensure adequate staffing patterns to support technical assistance provision during initial "start up" activities.

7. **Practice: Coordinated transition programs for younger and older students have been established (i.e. preschool –> elementary –> MS/Jr. high –> HS –> post-secondary).[4]**

Strategies:

Develop procedures for transition between classes and schools utilizing district and school improvement committees.

8. **Practice: School personnel evaluation criteria includes a standard on the inclusion of all students with disabilities into all aspects of the school community.[3]**

Strategies:

Develop standards for inclusion with a district-wide advisory board which involves all of the key stakeholders.

Review current school personnel evaluation procedures and revise to incorporate inclusion responsibilities.

Develop policies to ensure that included students count as part of general education teacher's contractual class size and required support services are provided.

9. **Practice:** **The district incorporates aspects of inclusive practices into its annual district-wide program evaluation activity.**

Strategies:

Analyze effective practice checklist data.

Conduct pre/post I.E.P. reviews.

Evaluate of student, parent, and teacher satisfaction.

Evaluate of student outcomes.

Evaluate training events.

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1. These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

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3. These effective practice items have been taken or adapted from: Fragen, S., Keiser, N., Kinnaid, M., Uchtman, R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illinois State Board of Education, Project CHOICES/Early CHOICES, S.A.S.E.D.

4. These effective practice items have been taken or adapted from: Halvorsen, A., Smithey, L., & Neary, T. (1992). Implementation site criteria for inclusive programs. Sacramento, CA: California State Department of Education, PEERS Project.

5. These effective practice items have been taken or adapted from: Karasoff, P., Alwell, M., & Halvorsen, A. (1992). Systems change: A review of effective practices. Unpublished manuscript. San Francisco State University, California Research Institute.

RESOURCE PLANNING GUIDE - DISTRICT LEVEL

Several resources are provided for each of the following practices. These are listed in the Resources section (page 62) of this planning guide and can be located by reference number.

Effective Practices	Nos. 1-49	Nos. 50-99	Nos. 100-149	Nos. 150-199	Nos. 200-249	Nos. 250-299	Nos. 300-349	Nos. 350-406
1. The district develops and disseminates a mission statement which reflects the philosophy that all children can learn and the local school is accountable for serving all students.[1,3]	20 21 22	84		149a	216 225	266 280 293	305 306 307 322 323 338 344	377
2. The district facilitates locally owned change at the school site by providing policies and procedures that support building level implementation.[3]	4 5 34 49	77	106 137	149a 164 199	225	254 280 293 294 295	306 324 338	362 370
3. The district promotes awareness, knowledge, and adoption of best practices for inclusive programs and the continual updating of these services by seeking inservice training and consultation on an ongoing basis.[2,3]	7 8 34 44 48 49	96	106 107 146	149a 199		253 254 270 271 292	312 313 314 329 334	350 351 368 389
4. All school buildings are accessible to students with disabilities served by the district and to other individuals with disabilities in the community who may be employed in or visit these sites.[3]				149a	231	289 292	307 333	
5. Students with and without disabilities wait at school bus stops together and ride to and from school on the same bus.[3]				149a	231	289 292	333 337	362

Effective Practices	Nos. 1-49	Nos. 50-99	Nos. 100-149	Nos. 150-199	Nos. 200-249	Nos. 250-299	Nos. 300-349	Nos. 350-406
6. Inclusive programs have been established at each school site and students with disabilities are members of age-appropriate (+/- 1yr.) general education classrooms in the same schools they would attend if they were non-disabled.[4]	6 13 21 22 25 29 30 39 42 48	58 59 62 63 68 74 90 91 94 96	104 105 110 115 119 125 135 147 149	151 152 155 157 167 184 185 190 197	212 216 220 221 222 229 231 232	262 267 268 276 289 293 294 295 296	306 315 321 333 337 338 341 344 346 347 349	351 361 364 370 381 393 394 395 399 400 404
7. Coordinated transition programs for younger and older students have been established (i.e. preschool –> elementary –> MS/Jr. high –> HS –> post-secondary).[4]	6 13 42 48	50 56 93	110 116 117 119 145 147 149	156 158 189	229 231 248	263 268 269 282 288 289 293	306	355 358 359 360 372 373 399
8. School personnel evaluation criteria includes a standard on the inclusion of all students with disabilities into all aspects of the school community.[3]	7	68		183			329	368
9. The district incorporates aspects of inclusive practices into its annual district-wide program evaluation activity.[3]						267 268 269 270		

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[1] These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

[2] These effective practice items have been taken or adapted from: Karasoff, P. (1991). Strategies (Bulletin), 3(2). San Francisco, CA: San Francisco State University, California Research Institute.

[3] These effective practice items have been taken or adapted from: [illegible], S., [illegible], N., Kincaid, M., [illegible], R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illinois State Board of Education, Project CHOICES/Early CHOICES, S.A.S.E.D.

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[5] These effective practice items have been taken or adapted from: Karasoff, P., Alwell, M., & Halvorsen, A. (1992). Systems change: A review of effective practices. Unpublished manuscript. San Francisco State University, California Research Institute.

Education Agency: ______________________________ Reviewers: ______________________________

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EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL[1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
LEADERSHIP AND SUPPORT Part 1: School Mission/Philosophy				
1.1 The school develops and disseminates a mission statement which reflects the philosophy that all children can learn and the school is responsible for serving them.[2]				
1.2 The school philosophy emphasizes responsiveness to families and encourages active family involvement.[2]				
1.3 The school philosophy supports the need for ongoing inservice training, staff development, and technical assistance.[2]				
Part 2: Administrative Responsibilities & Staff Supervision				
2.1 The principal is ultimately responsible for program implementation including staff supervision and evaluation.				
2.2 Special and general education teachers are responsible for: - Attending faculty meetings. - Participating in supervisory duties (e.g., lunch/bus/yard duty). - Participating in extracurricular activities (e.g., chaperon dances, work with student clubs). - Following school protocol; keeping principal or appropriate administrator informed on an ongoing basis.				
2.3 There is a defined plan and/or process for supporting staff in implementation (i.e., time for team planning meetings, opportunities for staff development).				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL [1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
PROGRAM PLANNING AND IMPLEMENTATION Part 3: IEP Development				
3.1 Instructional staff and related service providers complete a functional assessment as an initial step in IEP development.				
3.2 Activity-based evaluations of student interests and family priorities are part of the functional assessment.				
3.3 Student programs are developed across the following curricular content areas: - Communication/Socialization - Personal Management (includes Self Determination) - Recreation/Leisure - Home/Domestic - General Education/Academic - Transition/Vocational				
3.4 Parents, general and special education teachers, related service personnel, and students collaborate to write joint IEP goals and objectives.				
3.5 IEPs include personal management objectives to promote student self-advocacy (i.e., decision-making, choice-making, individual responsibility).[2]				
3.6 IEP objectives are developed with families and reflect family priorities.				
3.7 Student IEPs include instruction of functional activities in age-appropriate school and community settings.				
3.8 IEP objectives reflect interaction with nondisabled peers.				

*** Status Key:** 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL [1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
3.9 IEPs for students age 14 and older include objectives that address skills and services needed to support transition to adult roles.				
3.10 IEP/placement teams use natural proportion guidelines when placing students with disabilities in general education classrooms.[1]				
3.11 The supports, aids, curricular modifications and other instructional methods required for the student to be successful in school and community settings are discussed during IEP meetings using a transdisciplinary approach.[3]				
3.12 The supports, aids, curricular modifications, and other instructional methods outlined in the IEP are implemented and updated according to the student's progress.[3]				
Part 4: Collaborative Teamwork				
4.1 Teams meet weekly to plan instructional support services for all students.				
4.2 The team collaborates to: 1) develop peer network/interactive systems; 2) adapt learning objectives for students within the context of the core curriculum; 3) make material and environmental adaptations; and 4) provide physical assistance as needed.[1]				
4.3 Teams collaborate to provide related services in inclusive settings.				
4.4 Teams initiate systematic transition planning to support successful transition from one program to another.[1]				
4.5 Team members meet informally with one another to discuss ongoing inclusion issues and maintain continuous communication.				
4.6 Teams assist families in accessing community resources.[1]				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL [1]

Effective Practice	* Status			Priority
	Date	Date	Date	✓
Part 5: Professional Practices				
5.1 All instructional staff work with students in age-appropriate general education and community settings.				
5.2 Related services staff provide services in general education classrooms and in community settings using transdisciplinary and consultative approaches.				
5.3 Instructional staff and related service providers develop adaptations for individual students to facilitate independence which are useful across environments.				
5.4 Instructional staff plan activities using materials, instructional procedures and environments that are age-appropriate and individualized.				
5.5 Instructional staff adapt the general education curriculum to address academic and/or community-referenced content areas to meet IEP objectives.				
5.6 Instructional staff incorporate ability awareness into general education curriculum on diversity and the human experience.				
5.7 Instructional staff and related service providers ensure interaction with nondisabled peers in all activities.[1]				
5.8 Instructional staff implement positive behavior management strategies that utilize natural cues/corrections with support from related services personnel and other team members.				
5.9 Instructional staff demonstrate positive attitudes towards and age-appropriate interactions with all students.[1]				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

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EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL [1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
STUDENT INCLUSION Part 6: Student Activities				
6.1 Students have access to all school environments for instruction and interactions.[1]				
6.2 Students participate in and are included in activities such as:[1] - music - general education classes - art - home economics - library - work experience - gym - recess/break - lunch - computer use - assemblies - graduation exercises - clubs - field trips				
6.3 Students with disabilities are involved in extracurricular school activities such as:[1] - clubs - scouts - dances - after school recreation/day care programs				
Part 7: Interaction with Peers				
7.1 Students' instructional programs incorporate interaction with nondisabled students in the following areas:[1] - Communication/Socialization -Home/Domestic - Personal Management (includes Self Determination) - Recreation/Leisure - Transition/Vocational - General Education/Academic				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL [1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
7.2 Students are involved with age-appropriate, nondisabled peers in structured interaction programs such as:[1] - Peer tutoring in school and community environments - "PALS" (Partners at Lunch) or lunch buddies - Circle of Friends - Co-worker support at job training site - MAPS - General education class activities				
7.3 Social interaction programs are:[1] - Well organized - Positive in orientation (emphasizing students' strengths, focusing on functional activities) - Well-attended - Supported by principal, faculty, and parents - Viewed as a positive experience by students				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

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1. The majority of the effective practice items contained in this checklist have been adapted from: Halvorsen, A., Smithey, L., & Neary, T. (1992). Implementation site criteria for inclusive programs. Sacramento, CA: California State Department of Education, PEERS Project.

2. These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

3. These effective practice items have been taken or adapted from : Freagon, S., Keiser, N., Kincaid, M., Usilton, R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illinois State Board of Education, Project CHOICES/Early CHOICES, S.A.S.E.D.

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EFFECTIVE BUILDING LEVEL PRACTICES AND SUPPORTIVE STRATEGIES[1]

LEADERSHIP AND SUPPORT

Part 1: School Mission/Philosophy

1.1 **Practices: The school develops and disseminates a mission statement which reflects the philosophy that all children can learn and the school is responsible for serving them.[2]**

Strategies:

Form or utilize an existing school improvement committee which includes representation from parents, students, teachers, school administration, related services staff, school advisory council, and the community to address inclusion.

Develop a shared vision for change and inclusion based on desired student outcomes.

Develop the mission statement incorporating the following components: a definition of inclusion, a rationale for implementing inclusive educational programs, a belief or vision statement, a brief outline of administrative policies that support inclusive practice, and recommended strategies and procedures for implementation.

Discuss the school inclusion mission statement with the PTA, school staff, and other interested key stakeholders.

Request that key stakeholders disseminate the inclusion mission statement to their constituent groups.

1.2 **Practice: The school philosophy emphasizes responsiveness to families and encourages active family involvement.[2]**

Strategies:

Form a school improvement committee which includes representation from parents, students, teachers, school administration, related services staff, school advisory council, and the community.

Involve interested parents in planning and evaluating inclusion at the site level (e.g., via school site councils, inclusion task forces, student planning teams, etc.).

Include interested parents in all inservice training activities (as both participants and trainers).

Involve PTA in inclusion efforts.

Communicate regularly with parents.

1.3 Practice: **The school philosophy supports the need for ongoing inservice training, staff development, and technical assistance.**[3]

Strategies:

Conduct inservice training needs assessments across parents, teaching and instructional staff, related services personnel, and administrators.

Incorporate inclusion topics into school's comprehensive inservice plan with suggestions from school personnel.

Work with local university community to address inservice needs.

Provide opportunities for inservice training providers to interact with one another at site and district levels.

Develop a district level support team to guide training efforts for the school community.

Provide opportunities for teachers, staff, and parents to visit model inclusive programs in the district or elsewhere.

Keep faculty informed about inclusive classes (e.g., staff presentations, regular faculty meetings).

Include articles about inclusion in the school newspaper to highlight the importance of inclusion to students, parents, and school personnel and to share successful strategies.

Provide information about inclusion in newsletters to all parents.

Part 2: Administrative Responsibilities & Staff Supervision

2.1 Practice: **The principal is ultimately responsible for program implementation including staff supervision and evaluation.**

Strategies:

Review existing service delivery plans and administrative responsibilities related to chain of command, staff supervision and evaluation; then modify plan to support building-based ownership of inclusive practice.

Ensure that all school personnel, including special education and related services staff, share common information concerning school rules and protocol.

Schedule special education staff for the same lunch periods and preparation periods as general education staff.

Provide leadership training for principals to enhance their skill in supervising all programs.

Design the master schedule to include all students and instructional personnel and accommodate team meetings and planning periods.

Merge special education personnel with general education teams to foster shared responsibility and collaboration.

Develop building level implementation guide for collaboration and inclusion outlining the roles, responsibilities, and process for teaming to individualize student programs following the first school year.

2.2 Practice: **Special and general education teachers are responsible for:**

- **Attending faculty meetings.**
- **Participating in supervisory duties (e.g., lunch/bus/yard duty).**
- **Participating in extracurricular activities (e.g., chaperon dances, work with student clubs).**
- **Following school protocol by keeping principal or appropriate administrator informed on an ongoing basis.**

Strategies:

Ensure that special education is part of overall school restructuring plan.

Involve staff in revising their job descriptions to include inclusion responsibilities.

Ensure that all school personnel, including special education and related service staff, share common information concerning rules and protocol.

2.3 Practice: **There is an ongoing process to support staff in implementing inclusive practices (i.e., time for team planning meetings, opportunities for staff development).**

Strategies:

Review existing service delivery plans and administrative responsibilities on chain of command, staff supervision and evaluation and modify to support building-based ownership of inclusive practice.

Examine alternatives for redeploying existing resources, if necessary, to provide for itinerant support (i.e., alternative staffing patterns).

Provide release time support for preparation activities (e.g., team building and planning, instructional strategies).

Survey staff to determine their interest in and need for organized ability awareness education for themselves and for their students.

Examine within district for resources for training (i.e., identify local expertise).

Use mentor or lead teachers to conduct inservice training and set up peer coaching systems to maintain and reinforce instructional skills.

Include the total school community in collaboration training.

Evaluate the impact and utility of the inservice training activities on student outcomes.

PROGRAM PLANNING AND IMPLEMENTATION

Part 3: IEP Development

3.1 **Practice: Instructional staff and related service providers complete a functional assessment as an initial step in IEP development.**

Strategies:

Develop and implement a comprehensive inservice plan with the parents of students with disabilities and school site personnel which addresses functional assessment.

Obtain/develop material and human resources for technical assistance on functional assessment strategies.

Develop a manageable student data collection system for use by general education personnel and/or instructional teams.

Discuss grading and assessment practices and explore mastery and performance-based assessment strategies for all students (i.e., portfolio assessment).

3.2 **Practice: Activity-based evaluations of student interests and family priorities are part of the functional assessment.**

Strategies:

Develop and implement a comprehensive inservice plan with the parents of students with disabilities and school site personnel to address functional assessment.

Select or develop a structured family interview procedure.

Include parents as members of ongoing student planning teams.

3.3 **Practice: Student programs are developed across the following curricular content areas:**

- **Communication/Socialization**
- **Personal Management (includes Self Determination)**
- **Recreation/Leisure**
- **Home/Domestic**
- **General Education/Academic**
- **Transition/Vocational**

Strategies:

Develop and implement a comprehensive inservice plan across all domains with the parents of students with disabilities and school site personnel (i.e., social relationships, adapting curriculum, cooperative learning, functional assessments).

Obtain/develop technical assistance on adapting curriculum, use of natural supports, delivering instruction in community settings, scheduling staff, training job developers, and site management.

Use mentor or lead teachers to conduct inservices and serve as peer coaches.

Set up peer coaching systems to maintain and reinforce instructional skills.

Examine building policy for barriers to going off site (i.e., liability, training, transportation, fiscal issues, supervision) and then develop a policy and procedures guide which adheres to district policies.

Conduct inventories of community and school environments which are identified by parents via the parent interview process.

Involve related service staff in functional assessments and community-based instruction.

Develop a rotational job sampling program for secondary students.

Coordinate use of job sites across district to avoid seeking duplicate jobs.

Develop a student peer support system (i.e., utilizing natural supports).

Identify and utilize existing generic vocational education opportunities in the district.

Form interagency groups to develop inclusive options at the preschool and post school level with representation from early childhood lead agency, school district, community college, vocational rehabilitation, business community, parents, and self-advocates.

3.4 **Practice: Parents, general and special education teachers, related service personnel, and students collaborate to write joint IEP goals and objectives.**

Strategies:

Develop and implement a comprehensive inservice plan with the parents of students with disabilities and school site personnel which addresses team collaboration issues.

Employ a collaborative process for group decision-making.

Utilize MAPS or similar personal futures planning techniques.

Include parents as members of ongoing student planning teams.

3.5 **Practice: IEPs include personal management objectives to promote student self-advocacy (i.e., decision-making, choice-making, individual responsibility).[3]**

Strategies:

Include student in IEP development and decision-making.

Ensure that student preferences are reflected in IEP goals and objectives.

3.6 **Practice: IEP objectives are developed with families and reflect family priorities.**

Strategies:

Select or develop a structured parent interview procedure for use by site personnel and families.

Review and discuss the parent interview priorities as a team to negotiate issues that may arise when school and family priorities differ.

3.7 **Practice: Student IEPs include instruction of functional activities in age-appropriate school and community settings.**

Strategies:

Obtain/develop technical assistance resources on adapting curriculum, use of natural supports, delivering instruction in community settings, scheduling staff, and training job developers.

Examine building policy for barriers to going off site (i.e., liability, training, transportation, fiscal issues, supervision) and then develop a policy and procedures guide which adheres to district policies.

Conduct inventories of community and school environments which are identified by parents via the parent interview process.

Involve related service staff in functional assessments and community-based instruction.

Develop a rotational job sampling program for secondary students.

Coordinate use of job sites across district to avoid seeking duplicate jobs.

Develop a student peer support system (i.e., utilizing natural supports).

Identify and utilize existing generic vocational education opportunities in the district.

3.8 **Practice: IEP objectives reflect interaction with nondisabled peers.**

Strategies:

Obtain technical assistance on cooperative learning, adapting curriculum, use of natural supports, staff scheduling, and facilitating social interaction and social relationships.

Implement school site practices which promote the development of peer relationships (e.g., inclusion in activities across environments, teacher responsibilities within the school, transportation schedule and coordinated school hours, etc.).

Develop a peer support system (i.e. MAPS, peer tutoring, circle of friends, etc.).

3.9 **Practice: IEPs for students age 14 and older include objectives that address skills and services needed to support transition to adult life.**

Strategies:

Involve relevant adult service agnecies in transition planning within the IEP process.

Obtain/develop technical assistance on adapting curriculum, use of natural supports, delivering instruction in community settings, scheduling staff, and training job developers.

Focus on a variety of community-based vocational experiences for exploration and assessment.

Identify and utilize existing generic vocational education opportunities in the district.

Provide supports and adaptations needed to maintain community vocational education opportunities.

3.10 Practice: **IEP teams use natural proportion guidelines when serving students with disabilities in general education classrooms.**

Strategies:

Define the process for establishing inclusive classes and address issues such as heterogeneity, age-appropriateness of school for students, home/magnet schools, and geographic location.

Develop plans and timelines for establishing inclusive programs across ages/school levels (elementary/middle school/high school/post secondary).

Develop a process for transition between classes and schools at the school site and district level through the instructional planning or building level team process.

Compile information on attendance area for each student and begin a process for returning students to home schools.

Utilize heterogeneous grouping in classroom, school and community environments.

Review the organization and assignment of related service personnel and develop guidelines to ensure that related services are provided in naturally occurring classroom and community contexts.

3.11 Practice: **The supports, aids, curricular modifications and other instructional methods required for the student to be successful in school and community settings are discussed during IEP meetings using a transdisciplinary approach.**[3]

Strategies:

Develop and implement a comprehensive inservice plan across all domains with the parents of students with disabilities and school site personnel (i.e., social relationships, adapting curriculum, cooperative learning, functional assessments).

Develop inservice training for teams which include parents, instructional staff, and related service staff. Focus on issues such as collaborative consultation, role release, and adapting curriculum.

Use mentor or lead teachers and related services personnel to conduct inservices and serve as peer coaches.

3.12 **Practice: The supports, aids, curricular modifications, and other instructional methods outlined in the IEP are implemented and updated according to the student's progress.**[3]

Strategies:

Obtain/develop technical assistance resources on adapting curriculum, use of natural supports, delivering instruction in community settings, scheduling staff, and training job developers.

Develop a manageable student data collection system for use by general education personnel and/or instructional teams.

Discuss grading and assessment practices and explore mastery and performance-based assessment strategies for all students (i.e., portfolio assessment).

Part 4: Collaborative Teamwork

4.1 **Practice: Teams meet weekly to plan instructional support services for all students.**

Strategies:

Revise staff job descriptions to incorporate inclusion responsibilities.

Develop building level implementation guide for collaboration which outlines the roles, responsibilities, and process for teaming to facilitate individualized student programs.

Provide periodic release time for team preparation activities (e.g., team set up and planning; the development of school and community inventories).

Ensure that scheduling and existing coverage enable transdisciplinary teams including parents to meet on a regular basis (i.e., rotating substitute teachers, teacher preparation periods, block scheduling).

Develop and implement a comprehensive inservice plan with parents of students with disabilities and school site personnel.

4.2 **Practice: The team collaborates to: 1) develop peer network/interactive systems; 2) adapt learning objectives for students within the context of the core curriculum; 3) make materials and environmental adaptations; and 4) provide physical assistance as needed.**

Strategies:

Conduct inservice needs assessments across all targeted audiences.

Use mentor or lead teachers or related services staff to conduct inservices and serve as peer coaches.

Obtain technical assistance on adapting curriculum.

Ensure that students receive necessary levels of support when participating in general education (e.g., therapy, paraprofessional support, adaptations, natural supports) and fade supports when they are not required.

4.3 **Practice: Teams collaborate to provide related services in inclusive settings.**

Strategies:

Form interagency groups to develop inclusive options at the preschool and post school level with representation from the early childhood lead agency, school district, community college, vocational rehabilitation, business community, parents, and self-advocates.

Develop inservice training for teams which include parents, instructional staff, and related service staff. Focus on issues such as collaborative consultation and role release.

Set up peer coaching systems to maintain and reinforce related service delivery to students in inclusive contests.

Review the organization and assignment of related service personnel. Design and use a collaborative related services delivery model and provide therapy in inclusive settings.

Reorganize related service personnel's schedules to allow for providing services in natural settings (i.e., block scheduling).

4.4 **Practice: Teams initiate systematic transition planning to support successful transition from one program to another.**

Strategies:

Form interagency groups to develop inclusive options at the preschool and post school level with representation from early childhood lead agency, school district, community college, vocational rehabilitation, business community, parents, and self-advocates.

Outline the transition process between classes and schools at the school site level.

Examine site policy for barriers to going off site (i.e., liability, training, transportation, fiscal issues, supervision) and then develop a policy and procedures guide which adheres to district policies.

Conduct team meeting to develop the Individualized Transition Plan (ITP). Assign responsibilities and timelines to each team participant.

Include vocational training objectives for specific job sampling in the IEPs of students age 14 and older.

4.5 **Practice: Team members meet informally with one another to discuss ongoing inclusion issues and maintain continuous communication.**

Strategies:

Involve all parents of students with disabilities in all school activities such as student planning teams, parent/teacher conferences, and receiving general school mailings regarding school events.

Merge special education personnel with general education teams to foster shared responsibility and collaboration.

Schedule special education staff for the same lunch periods and preparation periods as general education staff.

4.6 **Practice: Teams assist families in accessing community resources.**

Strategies:

Provide families with a listing of community resources and specialized service systems.

Provide families with support from team members in securing needed resources.

Part 5: Professional Practices

5.1 **Practice: All instructional staff work with students in age-appropriate, general education and community settings.**

Strategies:

Revise staff job descriptions to include inclusion responsibilities.

Ensure that the policy on paraprofessionals allows them to implement teacher designed instruction away from the presence of certificated staff.

Examine building policy for barriers to going off site (i.e., liability, training, transportation, fiscal issues, supervision) and then develop a policy and procedures guide which adheres to district policies.

Form interagency groups to develop inclusive options at the preschool and post school level with representation from early childhood lead agency, school district, community college, vocational rehabilitation, business community, parents, and self-advocates.

Conduct inventories of community and school environments which are identified by parents via the parent interview process.

Identify and utilize existing generic daycare and preschool opportunities in the district.

Develop a rotational job sampling program for secondary students.

Identify and utilize existing generic vocational education opportunities in the district.

5.2 **Practice: Related services staff provide services in general education classrooms and in community settings using transdisciplinary and consultative approaches.**

Strategies:

Review the organization and assignment of related service personnel. Design and use a collaborative related services delivery model and provide therapy in inclusive settings.

Develop inservice training for teams which include parents, instructional staff, and related service staff. Focus on issues such as collaborative consultation skills, role release, and adapting curriculum.

Set up peer coaching systems to maintain and reinforce instructional skills used to support included students.

5.3 **Practice: Instructional staff and related service providers develop adaptations for individual students to facilitate independence across environments.**

Strategies:

Schedule multiple opportunities for students to demonstrate skills across environments, trainers, and activities.

5.4 **Practice: Instructional staff plan activities using materials, instructional procedures and environments that are age-appropriate and individualized.**

Strategies:

Obtain/develop technical assistance on cooperative learning

Utilize heterogeneous groups in classroom, school and community environments.

Utilize instructional and related services staff (i.e., therapists, paraprofessionals, etc.) to provide instruction/therapy in general education and community environments.

Discuss grading and assessment practices and explore mastery and performance-based assessment strategies for all students (i.e., portfolio assessment).

Ensure that students receive report cards at the same intervals as their peers.

5.5 **Practice: Instructional staff adapt the general education curriculum to address academic and/or community-referenced content areas to meet IEP objectives.**

Strategies:

Obtain/develop technical assistance on adapting curriculum.

Set up peer coaching systems to maintain and reinforce instructional skills used to support included students.

Use mentor or lead teachers to conduct inservices and serve as peer coaches.

5.6 **Practice: Instructional staff incorporate ability awareness into general education curriculum on diversity and the human experience.**

Strategies:

Survey staff to determine their interest in and need for organized ability awareness education for themselves and for their students.

Include articles about inclusion in the school newspaper before and after these programs are implemented.

Provide information about inclusion in newsletters to all parents.

Schedule presentations by guest speakers who are individuals with disabilities.

Infuse issues on disabilities and diversity within the general education curriculum.

Select media (e.g., library books, films) about successful people with disabilities.

5.7 Practice: Instructional staff and related service providers ensure interaction with nondisabled peers in all activities

Strategies:

Conduct building level inservice training on strategies to facilitate social interaction.

Obtain/develop technical assistance on cooperative learning, adapting curriculum, natural supports, and facilitating social relationships.

Implement school site practices to promote the development of peer relationships (e.g., inclusion in activities across environments, transportation schedule, and coordinated school hours, etc.).

Establish mechanisms and procedures for creating structured interaction programs (e.g., peer tutoring, circles of friends) involving general education students (site-based work experience, service credits, elective courses where appropriate).

Utilize natural supports to facilitate social interaction (i.e., enlist support from peers in the general education classroom).

Examine each aspect of the program to determine naturally occurring opportunities for interaction.

Use adaptations of MAPS and Circle of Friends to develop peer friendships and natural supports.

Enlist student participation in instructional and school planning teams to identify existing clubs and extracurricular activities (e.g., utilize the Student Council in developing peer support).

Involve the special education teacher in using their expertise to sponsor clubs and include students.

Examine the role of the paraprofessional and involve them in working with nondisabled students as well as students with disabilities.

5.8 **Practice: Instructional staff implement positive behavior management strategies that utilize natural cues/corrections with support from related services personnel and other team members.**

Strategies:

Develop and implement a comprehensive inservice plan with the parents of students with disabilities and school site personnel to address positive behavioral support strategies.

Use mentor or lead teachers to conduct inservices and set up peer coaching systems to maintain and reinforce positive behavior management skills.

5.9 **Practice: Instructional staff demonstrate positive attitudes towards and age-appropriate interactions with all students.**

Strategies:

Develop and implement a comprehensive inservice plan with parents and school site personnel to address ability awareness and teacher modeling.

Ensure that students are included in all activities (i.e., taking yearbook and class pictures, graduation, orientations, class trips).

STUDENT INCLUSION

Part 6: Student Activities

6.1 **Practice: Students have access to all school environments for instruction and interactions.**

Strategies:

Use heterogeneous grouping strategies.

Work with school site teams to review existing clubs and opportunities for peer support in facilitating participation.

Enlist student participation in instructional and school planning teams.

Utilize natural supports to facilitate social interaction.

Utilize the Student Council in developing peer support.

Enlist support from peers in the general education classroom.

Develop a plan for recruiting general education peers to facilitate peer tutoring or friends programs.

Develop a peer and/or family support system to enable all students to participate.

Utilize instructional and related services staff (i.e., therapists, paraprofessionals, etc.) to support students in inclusive environments.

6.2 Practice: Students participate in and are included in all activities such as:

- **music**
- **art**
- **library**
- **gym**
- **lunch**
- **assemblies**
- **clubs**
- **general education classes**
- **home economics**
- **work experience**
- **recess/break**
- **computer use**
- **graduation exercises**
- **field trips**

Strategies:

Ensure that all students are included in master scheduling process.

Develop a peer and/or family support system to enable all students to participate.

Develop a plan for recruiting general education peers to facilitate peer tutoring or friends programs.

Examine the role of the paraprofessional and involve them in working with nondisabled students as well as students with disabilities.

Utilize instructional and related services staff (i.e., therapists, paraprofessionals, etc.) to support students in inclusive environments.

Use heterogeneous grouping strategies.

Work with school site teams to review existing clubs and opportunities for peer support in facilitating participation.

Enlist support from peers in the general education classroom.

Enlist student participation in instructional and school planning teams.

Utilize the Student Council in developing peer support.

6.3 **Practice: Students with disabilities are involved in extracurricular school activities such as:**

- **clubs**
- **dances**
- **after school recreation/day care programs**
- **scouts**

Strategies:

Develop a peer support system and/or family support system to enable all students to participate

Enlist student participation in instructional and school planning teams.

Enlist support from peers in the general education classroom.

Use other support staff (i.e., speech teachers, paraprofessionals, etc.) to provide instruction/therapy in general education and community environments.

Utilize the Student Council to develop peer support.

Work with school site teams to review existing clubs and opportunities for peer support in facilitating participation.

Develop a plan for recruiting general education peers to facilitate peer tutoring or friends programs.

Utilize instructional and related services staff (i.e., therapists, paraprofessionals, etc.) to support students in inclusive environments.

Part 7: Interaction with Peers

7.1 **Practice: Students' instructional programs incorporate interaction with nondisabled students in the following areas:**

- **Communication/Socialization**
- **Home/Domestic**
- **Personal Management (includes Self Determination)**
- **Recreation/Leisure**
- **Transition/Vocational**
- **General Education/Academic**

Strategies:

Obtain/develop technical assistance on cooperative learning, adapting curriculum, use of natural supports, and facilitating social relationships.

Develop school site practices which facilitate peer relationships (e.g., inclusion in activities across environments, teacher responsibilities within the school, transportation schedule and coordinated school hours, etc.).

Develop a plan for recruiting general education peers to facilitate peer tutoring or friends programs.

Develop a peer support system and/or family support system to enable all students to participate.

Enlist student participation in instructional and school planning teams.

Enlist support from peers in the general education classroom.

7.2 **Practice: Students are involved with age-appropriate, nondisabled peers in structured interaction programs such as:**

- Peer tutoring in school and community environments
- "PALS" (Partners at Lunch) or lunch buddies
- Circle of Friends
- Co-worker support at job training site
- MAPS

Strategies:

Obtain/develop technical assistance on cooperative learning, adapting curriculum, use of natural supports, and facilitating social relationships.

Put in place mechanisms and procedures for creating structured interaction programs (e.g., peer tutoring, circles of friends) involving general education students (site-based work experience, service credits, elective courses where appropriate).

Implement school site practices which promote the development of peer relationships (e.g., inclusion in activities across environments, teacher responsibilities within the school, transportation schedule and coordinated school hours, etc.).

Utilize instructional and related services staff (i.e., therapists, paraprofessionals, etc.) to provide instruction/therapy in general education and community environments.

Utilize natural supports to facilitate social interaction.

Use adaptations of Maps and Circle of Friends for all students.

Develop a plan for recruiting general education peers to facilitate peer tutoring or friends programs.

7.3 **Practice: Social interaction programs are:**

- **Well organized**
- **Positive in orientation (emphasizing students' strengths, focusing on functional activities)**
- **Well-attended**
- **Supported by principal, faculty, and parents**
- **Viewed as a positive experience by students**

Strategies:

Develop and implement a comprehensive inservice plan with parents and school site personnel which addresses social relationships.

Provide parents opportunities to visit model inclusive sites that have social interaction programs in operation.

Provide information about social interaction programs in newsletters to all parents.

Involve PTA in planning social interaction programs.

Involve parents in planning social interaction programs/activities at the site (e.g., via instructional planning teams, school site councils, site level inclusion task forces, etc.).

Evaluate outcomes of social interaction programs on an ongoing basis through student planning teams.

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2. These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

3. These effective practice items have been taken or adapted from : Freagon, S., Keiser, N., Kincaid, M., Usilton, R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illinois State Board of Education, Project CHOICES/Early CHOICES, S.A.S.E.D.

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RESOURCE PLANNING GUIDE - BUILDING LEVEL[1]

Several resources are provided for each of the following practices. These are listed in the Resource section (page 62) of this planning guide and can be located by reference number.

Effective Practices	Nos. 1-49	Nos. 50-99	Nos. 100-149	Nos. 150-199	Nos. 200-249	Nos. 250-299	Nos. 300-349	Nos. 350-406
1.1 The school develops and disseminates a mission statement which reflects the philosophy that all children can learn and the school is responsible for serving them.[2]				149a 152	215 219 231 248a	268 289 290 293 294 295	305 326 334 337 344	350
1.2 The school philosophy emphasizes responsiveness to families and encourages active family involvement.[2]	11 14 23 27 34 35 36 40 41 48	86 87 88 89	128 142	149a 153 156 159 166	207 233 248a 249	254 262 278 292	304 342	352 354 358 359 379
1.3 The school philosophy supports the need for ongoing inservice training, staff development, and technical assistance.[2]	7 8 44 48	85	107 126 146	149a 197 198	237 246 248a	270 271 292 293 294 295	312 314 329 330 336 339 348	350 351 368
2.1 The principal is ultimately responsible for program implementation including staff supervision and evaluation.	12 22 48	64 91 96	138	149a 197	229 237 248a	252 253 270 293 294 295	305 307 338 343	350 383
2.2 Special and general education teachers are responsible for: (See checklist)			138	149a	237 248a	252 290 292		

Effective Practices	Nos. 1-49	Nos. 50-99	Nos. 100-149	Nos. 150-199	Nos. 200-249	Nos. 250-299	Nos. 300-349	Nos. 350-406
2.3 There is a defined plan and/or process for supporting staff in implementation (i.e., time for team planning meetings, opportunities for staff development).	48		102	149a 187	248a	293 294 295		
3.1 Instructional staff and related service providers complete a functional assessment as an initial step in IEP development.	16	50 57 78	111 120 130 139 140 141 146	168 171 172 175 176 177 182 187 191	211 213 221 226	250 255 265 266 274 276 290 291 292	330 336 340 347 349	351 365 399 405
3.2 Activity-based evaluations of student interests and family priorities are part of the functional assessment.	16 27	50	128 142	156 166	248a	254 292	342	352 358 359
3.3 Student programs are organized according to the following curricular content areas: (See checklist)	16 28	50 57 65	101 122 130 139 141	156 171 172 173 178 186 199	221 248a	251 281 292	331	
3.4 Parents, general and special education teachers, related service personnel, and students collaborate to write joint IEP goals and objectives.	19	99		187	221 229 248a	265 266 290 292	305 312 314 337 349	351 381 393 396 399
3.5 IEPs include personal management objectives to promote student self-advocacy (i.e., decision-making, choice-making, individual responsibility).[2]	16 28	50 57 65	101 122 130 139 141	156 171 172 173 178 186 199	221	251 254 292	331	352 358 359
3.6 IEP objectives are developed with families and reflect family priorities.	16 27	50	128 142	156 166	211 248a	254 292	342	352 358 359

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Effective Practices	Nos. 1-49	Nos. 50-99	Nos. 100-149	Nos. 150-199	Nos. 200-249	Nos. 250-299	Nos. 300-349	Nos. 350-406
3.7 Student IEPs include instruction of functional activities in age-appropriate school and community settings.	7 10 16 28 31 45	50 57 58 69 74 94 95	100 101 106 112 115 116 118 127 129 136 139	156 163 164 169 170 171 172 173 175 178 180 187 196 199	217 239	251 253 281 285 287 289 292 297 298	317 318 319 327 328	360 362 366 369 374 379 395 400 406
3.8 IEP objectives reflect interaction with nondisabled peers.	3 17 21 24 48	55 70 94 98	129 139	151 167 174 176 177 190 192	201 218 232 240 241 245	258 259 260 264 289 291 292	303 308 310 320 325 340	
3.9 IEPs for students age 14 and older include objectives that address skills and services needed to support transition to adult roles.	7 10 16 28 31 45	50 57 58 67 69 74 92 94 95	100 101 106 112 115 116 118 127 129 136 139	156 163 164 169 170 171 172 173 175 178 180 187 196 199	217 239	251 253 281 285 287 289 292 297 298	317 318 319 327 328	360 362 366 369 374 379 395 400 406
3.10 IEP/placement teams use natural proportion guidelines when placing students with disabilities in general education classrooms.	6 7 13 29 30 42 48	68 90 91	110 119 147 149	150 178 187 193	201 220 221 229 231 232	289 293 294 295	306 349	393 395 399
3.11 The supports, aids, curricular modifications and other instructional methods required for the student to be successful in school and community settings are discussed during IEP meetings using a transdisciplinary approach.[3]	15 16 28	61	101 106 122 130 139 140	160 168 171 172 176 177 187	209 210 213 221 226 239 241 242 248a	254 291 292	340	369 378 380

Effective Practices	Nos. 1-49	Nos. 50-99	Nos. 100-149	Nos. 150-199	Nos. 200-249	Nos. 250-299	Nos. 300-349	Nos. 350-406
3.12 The supports, aids, curricular modifications, and other instructional methods outlined in the IEP are implemented and updated according to the student's progress.[3]	15 16 28	61	101 106 122 130 139 140	160 168 171 172 176 177 187	209 210 213 221 226 239 241 242 248a	254 291 292	340	369 378 380
4.1 Teams meet weekly to plan instructional support services for all students.	7 8 44 48	61	102 107 146 148		248a	270 271 292	312 314	351 363
4.2 The team collaborates to: (See checklist)	1 7 19 21 27 43 48	61 85 94 98 99	102 111 121 126 128 142 143 145 146 149	150 151 156 166 167 187 190 191 195 197	221 224 229 232 245 248a	250 254 265 266 272 289 290 291 292	305 312 314 315 337 342 349	351 352 358 359 363 381 393 396 399 401
4.3 Teams collaborate to provide related services in inclusive settings.	2 7 19 49	61 68 78 99	102 108 109 111 118 120 132 146	150 151 165 178 182 187 191 193	201 203 204 205 206 220 221 229 244 248a	250 255 265 266 274 276 282 290 292	305 312 314 330 336 337 347 349	351 363 365 381 393 395 397 398 399 405
4.4 Teams initiate systematic transition planning to support successful transition from one program to another.	9 10 19 32 33	50 56 66 67 71 72 83 93	112 113 114 115 116 117 145	156 158 189	230 234 248	263 268 269 282 288 289 299	301 354 345 346	355 358 359 360 372 373 396
4.5 Team members meet informally with one another to discuss ongoing inclusion issues and maintain continuous communication.		99	102 111 146	187 191 197	229 248a	250 290 292	349	351 393 396 399
4.6 Teams assist families in accessing community resources.	27 48	50 56 60 71 72 93	114 116 117 128 142 145	156 166 189	230 234 248	254 288 289 292 299	342 345	352 354 355 358 359 373

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Effective Practices	Nos. 1-49	Nos. 50-99	Nos. 100-149	Nos. 150-199	Nos. 200-249	Nos. 250-299	Nos. 300-349	Nos. 350-406
5.1 All instructional staff work with students in age-appropriate general education and community settings.	7 10 16 19 20 29 30 45	58 68 69 90 94 99	100 112 115 116 118 121 127 136	150 163 164 169 170 178 187 193 195 196	201 220 221 229 232	253 258 259 260 265 266 281 289 290 292 297 298	305 309 312 314 317 328 337 349	351 360 362 366 381 393 395 399 400
5.2 Related services staff provide services in general education classrooms and in community settings using transdisciplinary and consultative approaches.	2 19 49	68 78 99	102 108 109 111 118 120 132 146	150 151 165 178 182 187 191 193	201 203 204 205 206 220 221 229 244 248a	250 255 265 266 274 276 282 290 292	305 312 314 330 336 337 347 349	351 365 381 393 395 397 398 399 405
5.3 Instructional staff and related service providers develop adaptations for individual students to facilitate independence which are useful across environments.	4 5 15 49	51 52 53 54 75 76 77 78 79 80 81 97	101 108 109 111 120 121 122 123 124 130 132 139 140 146	156 165 171 172 173 175 176 177 178 179 182 191 195 197	203 204 205 206 217 221 223 227 228 244 248a	250 254 255 256 261 273 274 275 276 282 283 286 292	325 330 336 347	365 384 385 386 387 388 389 390 391 395 403 405
5.4 Instructional staff plan activities using materials, instructional procedures and environments that are age-appropriate and individualized.	7 10 16 19 20 29 30 45	58 69 91 94 95 99	100 101 112 115 116 118 122 127 136	156 163 164 169 187 196 197	221 229 232 248a	253 258 259 260 265 266 281 289 290 292 297 298	305 312 314 317 328 332 337 349	351 360 362 366 378 379 381 393 399 400
5.5 Instructional staff adapt the general education curriculum to address academic and/or community-referenced content areas to meet IEP objectives.	1 7 19 20 21 43 48	85 94 98 99	121 126 143	151 167 187 190 195	221 224 229 232 245 248a	265 266 272 289 290 291 292	305 312 314 337 349	351 381 399
5.6 Instructional staff incorporate ability awareness into general education curriculum on diversity and the human experience.	20 44 48	73 94	143 148	151 193	212 246	264 270 292 293 294 295	308 312 314 315 316	351 397 398

Effective Practices	Nos. 1-49	Nos. 50-99	Nos. 100-149	Nos. 150-199	Nos. 200-249	Nos. 250-299	Nos. 300-349	Nos. 350-406
5.7 Instructional staff and related service providers ensure interaction with nondisabled peers in all activities	3 17 21 24 48	55 70 94 98	129 139	151 161 162 167 174 176 177 190 192	201 218 232 245 240 241 248a	258 259 260 264 289 291 292	303 308 310 320 325 340	
5.8 Instructional staff implement positive behavior management strategies that utilize natural cues/corrections with support from related services personnel and other team members.	48		126 197 229 236 238			292		393 402
5.9 Instructional staff demonstrate positive attitudes towards and age-appropriate interactions with all students.	20	73 94	143	193 197	208 229		315	
6.1 Students have access to all school environments for instruction and interactions.	6 13 19 21 37 39 46 48	58 59 63 94 98 99	102 110 115 119 125 133 135 137 138 147	151 152 154 157 167 180 184 185 197	201 208 218 232 245 248a	252 262 267 268 289 291 292 296 298	300 303 306 337 338 341 344 346	350 365 367 381 393 394 395 399 400 401
6.2 Students participate in and are included in activities such as: (See checklist)	19 21 37 46 48	58 59 63 94 98 99	133 137 138	151 167	201 208 218 232 245 248a	252 289 291 292 298	303 338 341 346	367 401
6.3 Students with disabilities are involved in extracurricular school activities such as: (See checklist)	19 21 37 46 48	58 59 94 98 99	133 137 138	151 167	201 218 232 245	252 289 291 292 298	303 338 341 346	401
7.1 Students' instructional programs incorporate interaction with nondisabled students in the following areas: (See checklist)	3 17 24 48	55 70 94 98 99	126 129 139	151 167 174 176 177 190 192	201 218 232 240 241 245 248a	258 259 260 264 289 291 292	303 308 310 320 325 340	

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Effective Practices	Nos. 1-49	Nos. 50-99	Nos. 100-149	Nos. 150-199	Nos. 200-249	Nos. 250-299	Nos. 300-349	Nos. 350-406
7.2 Students are involved with age-appropriate, nondisabled peers in structured interaction programs such as: (See checklist)	3 17 21 24 38 43 48	55 70 94 98 99	105 126 129 134 139	151 161 162 167 174 176 177 180 181 190 192 194	200 201 218 232 235 240 241 245 247 248a	257 258 259 260 264 272 289 291 292	302 303 308 310 311 320 325 335 340	356 365 375 376 400
7.3 Social interaction programs are: (See checklist)	11 14 23 27 35 48	82 94	128 142 149	153 156 166	200 248a	254 262 278 292	303 342 341	352 358 359 393

1. The majority of the effective practice items contained in this checklist have been adapted from: Halvorsen, A., Smithey, L., & Neary, T. (1992). Implementation site criteria for inclusive programs. Sacramento, CA: California State Department of Education, PEERS Project.

2. These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

3. These effective practice items have been taken or adapted from : Freagon, S., Keiser, N., Kincaid, M., Usilton, R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illinois State Board of Education, Project CHOICES/Early CHOICES, S.A.S.E.D.

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Appendix A

Effective Practice Checklists

Education Agency: ______________________________ Reviewers: ______________________________

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EFFECTIVE PRACTICE CHECKLIST - STATE LEVEL

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
1. The state develops and disseminates a mission statement which reflects the philosophy that all children can learn and considers the local school accountable for serving all students.[1]				
2. The state develops policies that facilitate district implementation of inclusive programs and eliminates policies that serve as disincentives.				
3. The state increases the awareness, knowledge, and adoption of best practices for inclusive educational programs.[2]				
4. The state promotes district implementation of inclusive programs.				
5. The state evaluates inclusive programs and practice to assess the impact of state policies annually.				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

[1] These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

[2] These effective practice items have been taken or adapted from: Karasoff, P. (1991). Strategies (Bulletin), 2(2). San Francisco, CA: San Francisco State University, California Research Institute.

[3] These effective practice items have been taken or adapted from: Karasoff, P. Alwell, M., & Halvorsen, A. (1992). Systems change: A review of effective practices. Unpublished manuscript. San Francisco State University, California Research Institute.

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Education Agency: ______________________ Reviewers: ______________________

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EFFECTIVE PRACTICE CHECKLIST - DISTRICT LEVEL

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
1. The district develops and disseminates a mission statement which reflects the philosophy that all children can learn and the local school is accountable for serving all students.[1,5]				
2. The district facilitates locally owned change at the school site by providing policies and procedures that support building level implementation.[5]				
3. The district promotes awareness, knowledge, and adoption of best practices for inclusive programs and the continual updating of these services by seeking inservice training and consultation on an ongoing basis.[2,5]				
4. All school buildings are accessible to students with disabilities served by the district and to other individuals with disabilities in the community who may be employed in or visit these sites.[3]				
5. Students with and without disabilities wait at school bus stops together and ride to and from school on the same bus.[3]				
6. Inclusive programs have been established at each school site and students with disabilities are members of age-appropriate (+/- 1yr.) general education classrooms in the same schools they would attend if they were non-disabled.[4]				
7. Coordinated transition programs for younger and older students have been established (i.e. preschool --> elementary --> MS/Jr. high --> HS --> post-secondary).[4]				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

EFFECTIVE PRACTICE CHECKLIST - DISTRICT LEVEL

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
8. School personnel evaluation criteria includes a standard on the inclusion of all students with disabilities into all aspects of the school community.[3] 9. The district incorporates aspects of inclusive practices into its annual district-wide program evaluation activity.[5]				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

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1. These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

2. These effective practice items have been taken or adapted from: Karasoff, P. (1991). Strategies (Bulletin), 3(2). San Francisco, CA: San Francisco State University, California Research Institute.

3. These effective practice items have been taken or adapted from: Feagan, S., Kelser, N., Kincaid, M., Walton, R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illinois State Board of Education, Project CHOICES/Early CHOICES, S.A.S.E.D.

4. These effective practice items have been taken or adapted from: Halvorsen, A., Smithey, L., & Neary, T. (1992). Implementation site criteria for inclusive programs. Sacramento, CA: California State Department of Education, PEERS Project.

5. These effective practice items have been taken or adapted from: Karasoff, P., Alwell, M., & Halvorsen, A. (1992). Systems change: A review of effective practices. Unpublished manuscript. San Francisco State University, California Research Institute.

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Education Agency: ____________ ________________ Reviewers: ______________________________
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EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL[1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
LEADERSHIP AND SUPPORT Part 1: School Mission/Philosophy				
1.1 The school develops and disseminates a mission statement which reflects the philosophy that all children can learn and the school is responsible for serving them.[2]				
1.2 The school philosophy emphasizes responsiveness to families and encourages active family involvement.[2]				
1.3 The school philosophy supports the need for ongoing inservice training, staff development, and technical assistance.[2]				
Part 2: Administrative Responsibilities & Staff Supervision				
2.1 The principal is ultimately responsible for program implementation including staff supervision and evaluation.				
2.2 Special and general education teachers are responsible for:				
- Attending faculty meetings. - Participating in supervisory duties (e.g., lunch/bus/yard duty). - Participating in extracurricular activities (e.g., chaperon dances, work with student clubs). - Following school protocol; keeping principal or appropriate administrator informed on an ongoing basis.				
2.3 There is a defined plan and/or process for supporting staff in implementation (i.e., time for team planning meetings, opportunities for staff development).				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL [1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
PROGRAM PLANNING AND IMPLEMENTATION Part 3: IEP Development				
3.1 Instructional staff and related service providers complete a functional assessment as an initial step in IEP development.				
3.2 Activity-based evaluations of student interests and family priorities are part of the functional assessment.				
3.3 Student programs are developed across the following curricular content areas: - Communication/Socialization - Personal Management (includes Self Determination) - Recreation/Leisure - Home/Domestic - General Education/Academic - Transition/Vocational				
3.4 Parents, general and special education teachers, related service personnel, and students collaborate to write joint IEP goals and objectives.				
3.5 IEPs include personal management objectives to promote student self-advocacy (i.e., decision-making, choice-making, individual responsibility).[2]				
3.6 IEP objectives are developed with families and reflect family priorities.				
3.7 Student IEPs include instruction of functional activities in age-appropriate school and community settings.				
3.8 IEP objectives reflect interaction with nondisabled peers.				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

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EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL[1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
3.9 IEPs for students age 14 and older include objectives that address skills and services needed to support transition to adult roles.				
3.10 IEP/placement teams use natural proportion guidelines when placing students with disabilities in general education classrooms.[1]				
3.11 The supports, aids, curricular modifications and other instructional methods required for the student to be successful in school and community settings are discussed during IEP meetings using a transdisciplinary approach.[3]				
3.12 The supports, aids, curricular modifications, and other instructional methods outlined in the IEP are implemented and updated according to the student's progress.[3]				
Part 4: Collaborative Teamwork				
4.1 Teams meet weekly to plan instructional support services for all students.				
4.2 The team collaborates to: 1) develop peer network/interactive systems; 2) adapt learning objectives for students within the context of the core curriculum; 3) make material and environmental adaptations; and 4) provide physical assistance as needed.[1]				
4.3 Teams collaborate to provide related services in inclusive settings.				
4.4 Teams initiate systematic transition planning to support successful transition from one program to another.[1]				
4.5 Team members meet informally with one another to discuss ongoing inclusion issues and maintain continuous communication.				
4.6 Teams assist families in accessing community resources.[1]				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

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EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL [1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
Part 5: Professional Practices				
5.1 All instructional staff work with students in age-appropriate general education and community settings.				
5.2 Related services staff provide services in general education classrooms and in community settings using transdisciplinary and consultative approaches.				
5.3 Instructional staff and related service providers develop adaptations for individual students to facilitate independence which are useful across environments.				
5.4 Instructional staff plan activities using materials, instructional procedures and environments that are age-appropriate and individualized.				
5.5 Instructional staff adapt the general education curriculum to address academic and/or community-referenced content areas to meet IEP objectives.				
5.6 Instructional staff incorporate ability awareness into general education curriculum on diversity and the human experience.				
5.7 Instructional staff and related service providers ensure interaction with nondisabled peers in all activities.[1]				
5.8 Instructional staff implement positive behavior management strategies that utilize natural cues/corrections with support from related services personnel and other team members.				
5.9 Instructional staff demonstrate positive attitudes towards and age-appropriate interactions with all students.[1]				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL [1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
STUDENT INCLUSION Part 6: Student Activities				
6.1 Students have access to all school environments for instruction and interactions.[1]				
6.2 Students participate in and are included in activities such as:[1] - music - art - library - gym - lunch - assemblies - clubs - general education classes - home economics - work experience - recess/break - computer use - graduation exercises - field trips				
6.3 Students with disabilities are involved in extracurricular school activities such as:[1] - clubs - dances - scouts - after school recreation/day care programs				
Part 7: Interaction with Peers				
7.1 Students' instructional programs incorporate interaction with nondisabled students in the following areas:[1] - Communication/Socialization - Personal Management (includes Self Determination) - Recreation/Leisure - General Education/Academic -Home/Domestic - Transition/Vocational				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

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EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL[1]

Effective Practice	* Status			Priority
	Date:	Date:	Date:	✓
7.2 Students are involved with age-appropriate, nondisabled peers in structured interaction programs such as:[1] - Peer tutoring in school and community environments - "PALS" (Partners at Lunch) or lunch buddies - Circle of Friends - Co-worker support at job training site - MAPS - General education class activities				
7.3 Social interaction programs are:[1] - Well organized - Positive in orientation (emphasizing students' strengths, focusing on functional activities) - Well-attended - Supported by principal, faculty, and parents - Viewed as a positive experience by students				

* Status Key: 1 = Practice is effectively implemented; 2 = Practice is implemented but needs improvement; 3 = Practice is not implemented

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1. The majority of the effective practice items contained in this checklist have been adapted from: Halvorsen, A., Smithey, L., & Neary, T. (1992). Implementation site criteria for inclusive programs. Sacramento, CA: California State Department of Education, PEERS Project.

2. These effective practice items have been taken or adapted from: Meyer, L.H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), 251-263.

3. These effective practice items have been taken or adapted from : Freagon, S., Keiser, N., Kincaid, M., Usilton, R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illinois State Board of Education, Project CHOICES/Early CHOICES, S.A.S.E.D.

Appendix B

Technical Assistance Planning Forms

TECHNICAL ASSISTANCE PLANNING FORM

Education Agency: ____________________

Date: ____________________

Practice(s): ____________________

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Planning Group Members: ____________________

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Strategies	Action Steps	Person(s) Responsible	Target Date	Status	Comments

TECHNICAL ASSISTANCE PLANNING FORM

Education Agency: ______________________________

Practice(s): ______________________________

Date: ______________________________

Planning Group Members: ______________________________

Strategies	Action Steps	Person(s) Responsible	Target Date	Status	Comments

TECHNICAL ASSISTANCE PLANNING FORM

Education Agency: ____________________

Date: ____________________

Practice(s): ____________________

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Planning Group Members: ____________________

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Strategies	Action Steps	Person(s) Responsible	Target Date	Status	Comments

TECHNICAL ASSISTANCE PLANNING FORM

Education Agency: ______________________

Date: ______________________

Practice(s): ______________________

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Planning Group Members: ______________________

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Strategies	Action Steps	Person(s) Responsible	Target Date	Status	Comments

TECHNICAL ASSISTANCE PLANNING FORM

Education Agency: ______________________________ **Date:** ____________________

Practice(s): ______________________________ **Planning Group Members:** ____________________

Strategies	Action Steps	Person(s) Responsible	Target Date	Status	Comments

Appendix G

Systems Change Manual

SYSTEMS CHANGE: A REVIEW OF EFFECTIVE PRACTICES

Patricia Karasoff
Morgen Alwell

California Research Institute
San Francisco State University

Ann Halvorsen

PEERS Project
California State University, Hayward

Preface By:

Anne Smith & Pat Hawkins
U.S. Department of Education

December, 1992

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The authors would like to thank the project personnel from the systems change projects in Arizona, California, Colorado, Hawaii, Illinois, Indiana, Kentucky, Michigan, New Hampshire, New York, Pennsylvania, South Dakota, Utah, Vermont, and Virginia for their invaluable assistance with the preparation of this manual.

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PREFACE

STATE-WIDE SYSTEMS CHANGE: A FEDERAL STRATEGY FOR INTEGRATION AND INCLUSION

By:

Anne Smith & Pat Hawkins
U.S. Department of Education

The Statewide Systems Change priority is a critical element of a Federal strategy to ensure that all children, including students with severe disabilities, are provided with equitable educational opportunities. The purpose of this priority is to encourage large scale adoption of state-of-the-art educational practice and is viewed by many parents and professionals as their best vehicle for movement from segregated to integrated educational and related services. In FY 1987, the Office of Special Education Programs (OSEP) expanded ongoing Federal initiatives to promote positive outcomes for students with severe disabilities by increasing the project period of the Statewide Systems Change priorities to five years and establishing a funding priority for a research institute on the placement and integration of children with severe disabilities. This expansion was driven by many factors including OSEP analysis of State placement data which indicated that significant numbers of children with severe disabilities continued to receive their education in separate classrooms and facilities despite the least restrictive environment (LRE) provision of the Education of the Handicapped Act (EHA).

Background

Prior to 1987, under the authority of EHA, OSEP had employed a variety of strategies to ensure that students with severe disabilities received appropriate educational and related services. Among these strategies were funding priorities for Personnel Preparation, Model Development and Demonstration, Technical Assistance, Inservice Training, LRE, and Statewide Systems Change. From FY 1980-86, the Statewide Systems Change projects were of three years duration and were intended to improve existing service delivery systems based upon a thorough State systems analysis. The Statewide Systems Change priority required States to design, implement, evaluate, and disseminate an improved comprehensive model for Statewide delivery of educational and related services for students with severe disabilities. Although some of these projects did develop implementation plans to install best practice within their States, it became evident that they were having minimal impact on State systems and were reaching small numbers of children. OSEP analysis of these projects revealed that Statewide Systems Change efforts were labor intensive and required:

(a) modifying multiple systems within the State;
(b) changing State policy and procedures;
(c) establishing collaborative relationships with LEAs wanting technical assistance to install integrated programs;
(d) changing attitudes among key stakeholders including parents, teachers, and administrators; and
(e) developing and modifying school and community referenced functional curricula.

OSEP determined that integration was progressing in stages; although children with severe disabilities were moving from segregated facilities to general education campuses, there were frequently placed into classrooms which were completely separate from their nondisabled peers. States that had undertaken systems change efforts requested further Federal assistance to ensure physical, social, and academic integration of students in general education campus settings. These factors led OSEP to lengthen the Statewide Systems Change project period to five years and establish a concurrent research institute to (a) investigate school placement patterns for children and youth with severe disabilities to determined factors that contribute to integrated school placement, (b) conduct research on promising practices in integrated settings, and (c) provide technical assistance to Statewide Systems Change projects.

Statewide Systems Change

Between FY 1987-90, sixteen States received Statewide Systems Change awards and establish collaborative relationships with the California Research Institute (CRI). The network of Statewide Systems Change projects and their project years are listed below.

1987-1992	California, Colorado, Illinois, Kentucky, Virginia
1988-1993	Indiana, New Hampshire, Vermont
1989-1994	Hawaii, Michigan, Utah, Washington
1990-1995	Arizona, New York, Pennsylvania, South Dakota

The activities of these Statewide Systems Change projects and CRI have created a synergistic momentum that has driven state and local school reform efforts across the nation by:

- increasing the physical integration of students with severe disabilities within age-appropriate general education campuses;
- increasing the social integration of students with severe disabilities with their nondisabled peers in school and community settings;
- increasing the academic integration of students with severe disabilities with their nondisabled peers in school and community settings;
- increasing the capacity of State and local education agencies to provide effective educational and related services to children and youth with severe disabilities;

- empowering parents to be actively involved in planning and implementing their children's inclusive educational programs;
- promoting collaborative relationships among students, parents, general and special education teachers, related service personnel, and building level personnel; and
- promoting collaborative relationships among professionals from local and state education agencies, adult service agencies, and universities.

Remaining Challenges

Reynolds (1988) summarizes the history of special education as a steady, gradual movement toward "progressive inclusion" from segregated service delivery patterns to increasingly integrated or inclusive arrangements. During the 1980s, the drive toward integrated education was generally viewed from two philosophical perspectives. The first was "values driven" and was based on the belief that integrated education was a civil right or an entitlement for all students. The second was "educational outcomes driven" in which integrated education was considered an effective means of achieving desired outcomes for students. As we move further into the 1990s, these two perspectives are merging into a strong, accelerating parent and professional movement promoting inclusive education for all children, including students with severe disabilities. Inclusive educational programs require changes from both general and special education to develop dynamic strategies and to restructure or "stretch the system" as educators accommodate students with diverse learning characteristics.

Systems Change: A Review of Effective Practices

CRI and the Statewide Systems Change projects have worked collaboratively to bridge the gap between research and practice by developing, validating, and disseminating information about systems change, school restructuring, and installation of state-of-the-art educational practices for students with severe disabilities. Their collective efforts have dramatically increased our understanding of these complex issues and have equipped us with strategies which promote systems improvement and change. CRI and Statewide Systems Change efforts have expanded our vision of what is possible by creating integrated and inclusive school communities across the nation. The strategies developed and implemented during the past five years are described in this monograph, *Systems Change: A Review of Effective Practices*, and will prove extremely valuable to schools and communities that wish to support the adoption and utilization of improved practices to realize this vision.

INTRODUCTION

By: Patricia Karasoff

Across the country a great deal of energy and expertise is expended on efforts to "change" educational systems to insure students with severe disabilities are being educated in integrated and inclusive environments. These initiatives are taking place nationwide. The federally funded systems change projects alone represent change initiatives occurring across 16 different states. Just talk with anyone who has or is currently engaged in an effort to initiate change and integrate an educational system, and you will detect a theme; the process is very complex! How then, given the dynamic nature of change, does one approach the challenge?

The "change agents" themselves are clearly the keys to a successful initiative. What strategies do these individuals who have experienced success use to facilitate change? The results of focus groups conducted by the California Research Institute in 1990 with 25 "change agents," representing 16 states with federally funded systems change projects (see page iii for listing), revealed the existence of several key activities. These have all been derived from initiatives with a common goal; to significantly increase the number of students with severe disabilities who are being educated in integrated and inclusive environments and to improve the educational services being delivered to these students. The activities displayed in Figure A-G emerged as essential aspects of successful systems change initiatives.

To examine these strategies more closely, CRI carried out several activities to document and describe these key components of systems change. In the fall of 1991 CRI developed a matrix utilizing the seven critical Systems Change Activity Areas displayed in Figures A-G. This matrix described in detail the strategies currently in use across the 16 systems change projects within each activity area. To validate the accurateness of these descriptions and to enhance them, CRI developed a Systems

Figure A
Activities to Facilitate Locally Owned Change

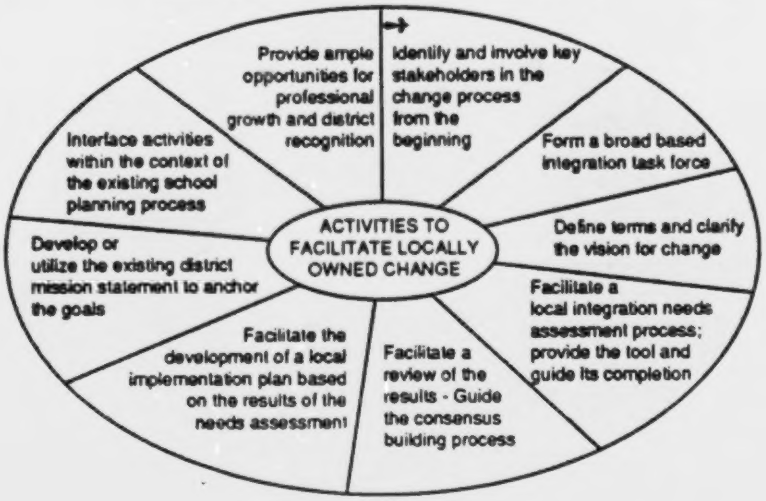
ACTIVITIES TO FACILITATE LOCALLY OWNED CHANGE
Identify and involve key stakeholders in the change process from the beginning
Form a broad based integration task force
Define terms and clarify the vision for change
Facilitate a local integration needs assessment process; provide the tool and guide its completion
Facilitate a review of the results - Guide the consensus building process
Facilitate the development of a local implementation plan based on the results of the needs assessment
Develop or utilize the existing district mission statement to anchor the goals
Interface activities within the context of the existing school planning process
Provide ample opportunities for professional growth and district recognition

Figure B
Activities to Increase Awareness and Knowledge of Best Practice

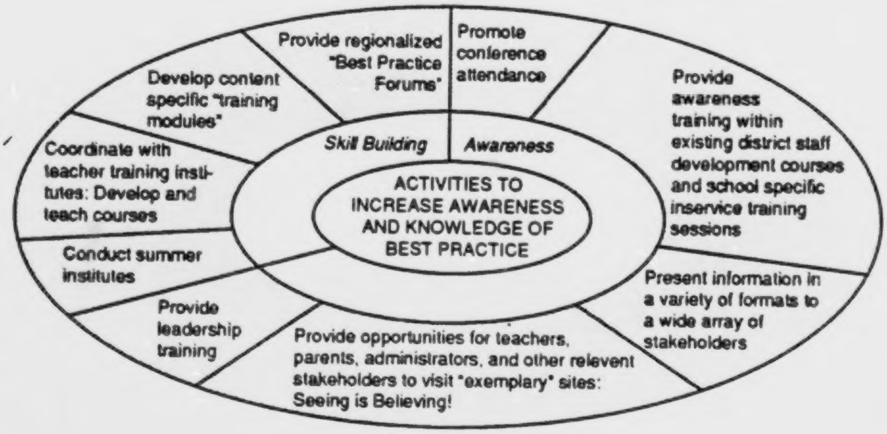
ACTIVITIES TO INCREASE AWARENESS AND KNOWLEDGE OF BEST PRACTICE
Skill Building
Awareness
Provide regionalized "Best Practice Forums"
Promote conference attendance
Provide awareness training within existing district staff development courses and school specific inservice training sessions
Present information in a variety of formats to a wide array of stakeholders
Provide opportunities for teachers, parents, administrators, and other relevent stakeholders to visit "exemplary" sites: Seeing is Believing!
Provide leadership training
Conduct summer institutes
Coordinate with teacher training institutes: Develop and teach courses
Develop content specific "training modules"

Figure C

Activities to Support the Implementation Effort

- Modify or develop new policies to support change
- Develop programmatic guidelines
- Modify job roles and descriptions
- Develop regional demonstration/implementatin sites
- Modify service delivery structure and resource allocations

Figure D

Activities to Increase Capacity and Build Networks

- Facilitate site networking meetings across the state
- Develop building-based support teams
- Create district-wide "cadres" of expertise
- Promote visitations within and across district for new ideas
- Share resources, videotapes, newsletters, books, etc.

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Figure E
Activities to Promote Collaboration

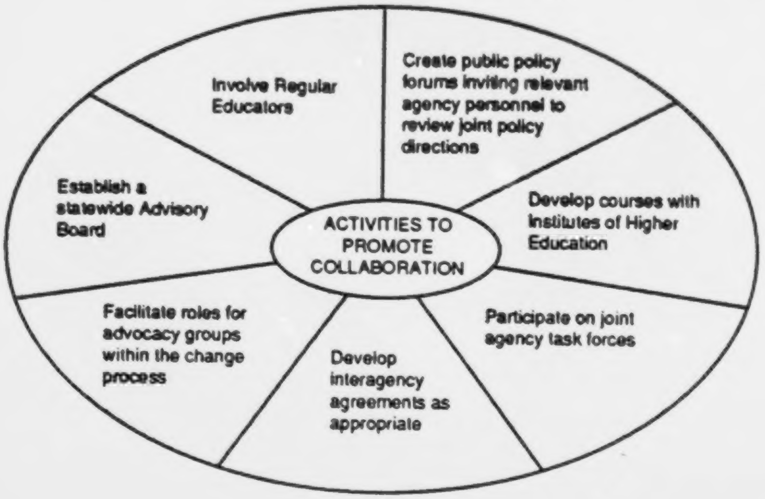

ACTIVITIES TO PROMOTE COLLABORATION
Involve Regular Educators
Create public policy forums inviting relevant agency personnel to review joint policy directions
Establish a statewide Advisory Board
Develop courses with Institutes of Higher Education
Facilitate roles for advocacy groups within the change process
Participate on joint agency task forces
Develop interagency agreements as appropriate

Figure F
Dissemination Activities

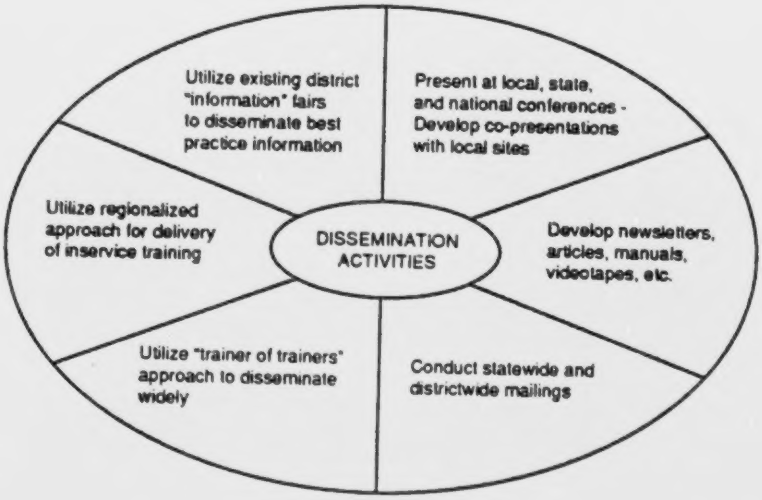
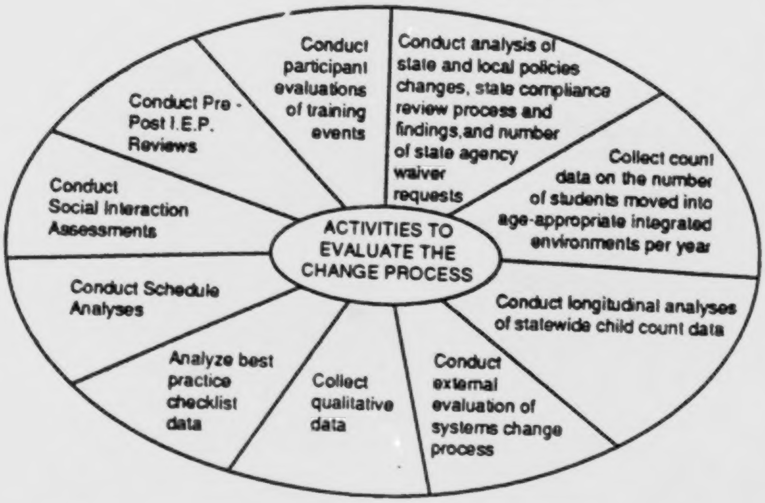

DISSEMINATION ACTIVITIES
Utilize existing district "information" fairs to disseminate best practice information
Present at local, state, and national conferences - Develop co-presentations with local sites
Utilize regionalized approach for delivery of inservice training
Develop newsletters, articles, manuals, videotapes, etc.
Utilize "trainer of trainers" approach to disseminate widely
Conduct statewide and districtwide mailings

Figure G
Activities to Evaluate the Change Process


ACTIVITIES TO EVALUATE THE CHANGE PROCESS
Conduct participant evaluations of training events
Conduct analysis of state and local policies changes, state compliance review process and findings, and number of state agency waiver requests
Conduct Pre - Post I.E.P. Reviews
Collect count data on the number of students moved into age-appropriate integrated environments per year
Conduct Social Interaction Assessments
Conduct Schedule Analyses
Conduct longitudinal analyses of statewide child count data
Analyze best practice checklist data
Collect qualitative data
Conduct external evaluation of systems change process

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Change Review Tool (Karasoff, 1991). This tool was used to collect additional information and verify existing information (from the matrix) on states' activities. Each of the 16 states was contacted to verify the information outlined on the review tool. The tool was sent to the state systems change coordinator for review and was returned to CRI with additions and corrections. All 16 states participated in this process. As a result of this activity CRI has developed this manual.

The purpose of this manual, "Systems Change: A Review of Effective Practices," is to describe and document these activities and strategies. Therefore, the critical activity areas identified and verified through the information collected on the Systems Change Review Tool constitute the main sections of the manual and are presented in the following chapters: (1) Facilitating Locally Owned Change; (2) Increasing Awareness and Knowledge of Best Practice; (3) Supporting the Implementation Effort; (4) Promoting Collaboration; (5) Dissemination Activities; and (6) Evaluating Change. The activities under the area originally described as Activities to Increase Capacity and Build Networks have been incorporated within the other six chapters.

Within each chapter the following information is provided: (a) a rationale as to why this critical activity area is pertinent with an overall comprehensive approach to systems change; (b) a narrative describing each of the strategies that falls under the critical activity area – these descriptions are highlighted with examples of specific strategies utilized in selected states along with illustrations utilizing actual case examples of implementation; and (c) an annotated listing of selected strategies utilized across the states within each critical activity area.

The authors envision this resource being used in several ways and, therefore, have designed it for multiple uses. Those readers seeking a comprehensive study of systems change are advised to read the entire manual, whereas, those interested in a specific aspect of the change process and related activities should focus in on those chapters of interest. Furthermore, those seeking references to other states' specific products or strategies are referred to a listing of project products, located in Appendix B, and the listing of Selected Systems Change Strategies found at the end of each chapter. Regardless of how the resource manual is used, we hope you find that it enriches your efforts to undertake the process of systems change.

CHAPTER 1

FACILITATING LOCALLY OWNED CHANGE

By: Ann Halvorsen

True systems change to support the integration of students with severe disabilities within their home schools and communities is synonymous with local ownership of that change. The common understanding and operationalizing of this concept is clear across all of the funded systems change projects that shared their strategies with us. Historically, from the societal change strategies of the 1960's War on Poverty to the current discussion of Enterprise Zones designed to effect meaningful change in inner city communities, the overriding theme has been the importance of indigenous leadership and direction for the design of change. This theme runs as well through the school reform literature, and is a critical component of school restructuring demonstrations as well as the American 2000 initiative (Sailor, 1991, Smith, Hunter & Schrag, 1991).

It reflects good common sense. Clearly, for reform to occur, a district or school must have internal investment in that process, which must in turn reflect and define the district's local vision. In the absence of that local vision, plans often go awry. The exemplary efforts of a rural community to include and support all of their students within general education classes cannot simply be transplanted to an inner city district with its crumbling physical plants and near-bankrupt finances. The planning process may be quite similar, and the desired best practices as well as the outcomes for students in inclusive settings will have many of the same features, but the markers along the way need to reflect the distinct characteristics and the context of each community.

For this to occur, the key stakeholders in the local district must direct the process. While advocacy and litigation have served as catalysts for change across the

United States, these in themselves tend to result in reform of mere pieces of the system, such as a new integrated program in one school, or for one group of children, rather than of the system itself. Eventually, in this scenario, repeated advocacy efforts are needed to support student transitions, or the introduction of additional students to the program. At some point local ownership and planning are needed to move from an adversarial relationship between one group and the system, to lasting internal change.

Similarly, external change agents such as project personnel can facilitate, but not direct the change process. Only the key stakeholders have the required expertise and intimate knowledge of the school community to articulate the philosophy and mission. Superintendents and Board Members know, for example, whether policies exist which may inhibit or provide disincentives to integration as well as how rapidly the district is growing, where new schools are planned, etc. Principals and teachers need to assess their own knowledge base, support, and inservice needs. Parents are the best informed regarding their children's educational priorities. Facilities and transportation personnel have invaluable information to contribute to the change process. The list goes on, but the critical players will differ from community to community and reflect both the vision and the specific nature of each district's concerns.

A locally-driven effort allows for these expressions of concern, and provides the vehicle to address multiple issues throughout the change process. We can expect that individuals will come to the process with differing levels of concern, such as those described by the Concerns-Based Adoption Model (CBAM) (Hord, 1987). In this model, six stages of concern, from awareness ("What are you talking about?") to refocusing ("I can think of some ways we could improve on what we've developed so far") are described, with strategies to respond for each level. A process for hearing, analyzing, and addressing concerns is inherent to local ownership, and is discussed below.

Once a local vision for change is established an external facilitator such as a systems change coordinator, university consultant or model demonstration project can provide guidance and assistance toward realizing that vision.

Activities to Facilitate Locally Owned Change

Ownership Defined

What are the elements of local ownership? The essential features which we have observed are ***leadership***, ***commitment*** at each level, ***participation*** and ***investment*** in the planning process, and the fit between inclusion and overall ***district reform/restructuring***.

Leadership

Five years ago, in one large urban district of Northern *California*, there were three categorically grouped segregated centers serving nearly 500 students with severe multiple disabilities from preschool through 22 years of age. Despite overtures by two local universities, critical state and federal compliance reviews and numerous mediations/ fair hearings on LRE issues, the district offered only a handful of integrated classes in its nearly 100 schools. An application was submitted to PEERS, (Providing Education for Everyone in Regular Schools) California's statewide systems change project for technical assistance in its first year, which coincided with the district's selection of a new Director of Special Education by the Superintendent. The Director accepted the job offer with the Superintendent's assurances that change toward integration would be a priority. Within nine months, more than 300 students previously served in isolated centers were attending a range of integrated options in their local schools. Now four years later, the one remaining center has half of its classes used by general education students. There are over 45 integrated programs across the district, many of which are inclusive in nature. Leadership was the first key to an opening for lasting change. This director's proactive leadership was characterized by several markers: 1) a personal vision for integration grounded in an effective schools framework; 2) a commitment and sense of urgency to realize that vision; 3) an ability to listen and respond to any individual's concern, and to demonstrate her valuing of each concern; 4) demonstrated credibility with her peers and superiors in the district; and 5) her problem-solving orientation. One example: She was able to guide the district's instructional cabinet toward adopting a policy where special education students who are included for one or more periods a day "count" in the teacher's contractual class size, even though they do not "count" for general education Average Daily Attendance (ADA) purposes under the state's funding model. The implications of this are clear: Once 30 students are included, a new general education teacher will be required. This Director was able to convince the cabinet to commit to and adopt the policy despite the Local Education Agency's (LEA) financial constraints.

Commitment

Ownership needs commitment at both grass roots and upper administrative levels, as well as everything in between. This can be fostered by strong leadership at the superintendent, director or board level. For example, consider a recent case in a high growth suburban ***California*** district. Most students with moderate to severe disabilities had attended county-operated programs, the majority of which were situated outside the district until two events occurred during the same year: 1) an active parent was elected to the district's Board of Education, and 2) the county placed a team-taught kindergarten, developed by a general and special educator, in one of the district's schools. The Board began to question the costs of the county program and wanted to hear more about inclusive/integrated options from everyone involved with the kindergarten. At the same time real grass roots support at the school level began to stimulate inclusion of those kindergartners in first grade and beyond. A year later, other students are being included in middle school; a team is working on short and long term plans to serve all the students who now attend county-operated programs; the Director is retiring and a new proactive replacement is being sought; and collaboration among these special education activities and district restructuring efforts is evident.

Participation in the planning process will also assist in developing investment in the goals of that process, and is discussed in detail below. However, all of us can recall instances where change agents have attempted to work around key players when those individuals were considered to be counterproductive to the process. We must emphasize that creative techniques for obtaining at minimum the representation of all constituencies are essential to the success of the process. A decade ago in one major urban district, systems change and LEA staff made a decision to "work around" a center principal, to basically ignore him during the change process. The problems engendered by this approach were several: a) people hadn't recognized his large base of support, and the subsequent backlash against integration efforts; b) a rumor mill became rampant, i.e., those left out of the process began making up their own stories about what was developing; and c) this constituency had less opportunity than anyone for their concerns to be heard. Perhaps as a direct result of this error, that center remained open with two or three classes for 8 years beyond the integration of 800 other students throughout the district.

Restructuring and Reform

The Regular Education Initiative (REI) of recent years (Will, 1986; Wang, 1988) has been problematic in that the impetus for the reform came primarily from within Special Education (Sailor, 1991). What the REI lacked, to some extent, was correspondence with the concurrent effective schools reform in general education.

New opportunities exist today for a truly shared agenda (Sailor, 1991; Sailor, Gee & Karasoff, in press). The language of change in both general and special education has become increasingly similar, as educators discuss instructional and curricular processes such as cooperative learning, and thematic activity-based instruction, and look to share resources by infusing programs into the whole, with inclusion of all students as a part of each school (Servatius, Fellows & Kelly, 1992; Schattman & Benay, 1992).

Inclusion and integration make the most sense to educators when they are seen as a part of the larger context, where all students benefit. It is incumbent on special educators to examine the fit between their goals and those of general education at state, district and local levels, and to move toward greater alignment of these, using many of the strategies outlined in this and upcoming sections of the manual.

Facilitator's Role

External change agents, such as systems change project personnel, can foster the development of leadership, commitment, stakeholder participation and alignment with restructuring elements if the initial stages of these exist, and as long as this "external authority" is not substituted for the expertise of local practitioners (Elmore & McLaughlin, 1988). Facilitators can do this through several activities. They may:

1) Co-present with staff about integration to critical groups e.g. Boards of Education, Superintendents, Teachers Association, parent advocacy organizations, etc., as is the case in ***Illinois, California*** and ***New Hampshire***.

2) Provide resources and materials for internal use and training e.g. videotapes, articles, research reports, etc.

3) Share resources such as sample plans and best practice guidelines from similar districts.

4) Connect LEA with any local Institutes of Higher Education (IHE) resources for inservice training, and evaluation purposes.

5) Assist with initial needs assessment processes to examine the status of existing integration/inclusion in the LEA by accompanying the director and others on district program visits, talking with staff, discussing needs informally, and becoming visible in the LEA (***Indiana, Michigan, California***).

6) Review LEA Strategic Plan and suggest to Superintendent/Director areas where special education plans could be more fully incorporated.

7) Brainstorm with Director and core steering committee on how to develop a district wide integration planning group or "support team," which constituencies should be represented, how selection process will occur, charge and status of the group, as well as the governance approval process for recommendations and plans developed (***California***).

Participation of Key Constituencies

For the majority of LEAs in systems change project states across the United States which have successfully implemented quality integrated education, involvement of stakeholders in the process is a standard element. As we discussed earlier, the climate for change is enhanced by the local contribution and investment that result from this participation.

Developing a Representative Group

How a district-wide task force or support team is formed will impact directly on its future effectiveness. Several questions can guide districts in this process:

1. *Which Organizations/Departments/Groups Need to Participate in the Plan?*

   This decision should be made by the Superintendent with the Director. The groups selected should reflect the nature of the community and probable local priorities or issues. For example, in Solano County ***California***, where the development of integrated preschool options was the top priority, the Integration Support Team reflected that direction. Invited participants included: parents, district/county office of education administrators and teachers, private preschool providers for typical students, federal/ state-funded preschool providers (HeadStart, child development centers), the Early Childhood Education Department and lab school at the local community college, Recreation Department personnel, and so on. These were the people whose buy-in and contributions would be essential to the viability of future options.

   Across the states, these groups reflect local structure and organizations. For example, ***Michigan*** forms both a School Coalition (Superintendent, general and special education administrators, teachers, parents, support personnel etc.) and an Inclusion Advisory Group of advocates, parents, and community representatives who live in the district. The first is designed to develop a working partnership to foster inclusive education in school districts in the area, the second makes recommendations, serves as an information source and provides support of local inclusive options.

2. *How Will Representatives of These Organizations be Selected?*

This process will reflect both the status and intent of the effort. For example, if a letter comes from the Superintendent of the LEA to the organization/department requesting an appointment of a representative, this implies top level district ownership and high status of the task force, and selection of the representative can be left to the group itself. However, if the participation of individuals with specific expertise or interest in integration is preferred, then a follow-up phone call by the Director could be made with suggestions of specific individuals. The role of the members (liaison, contributor, communicator) should also be delineated in these initial contacts.

3. *How Will the Charge of the Task Force be Communicated to Them and Throughout the LEA?*

It is critical that participants understand the group's purpose from the outset. The initial Superintendent's letter should state this clearly, e.g., "to design and initiate implementation of quality integrated programming for all students." The LEA also needs to have a strategy for initial meetings where the local vision for integration will be articulated.

4. *Where Does the Task Force Fit Within the District Hierarchy?*

The system for the revision, approval or adoption of the mission and plans developed by the Task Force needs to be in place and communicated to all stakeholders. Local governance structures will determine the process. In a single district, the hierarchy will be straightforward through the levels of the administration to the Board of Education. In multi-LEA consortia or intermediate units this process may be more complex, e.g., through a Directors' Steering Committee to a Superintendents' Council and a Joint

Powers Board of Education. Whatever the process, its steps should be clear to all participants. Too often, teachers and implementers are not informed of their administration's approval process, and are left to wonder who created this policy or that program, or, e.g., what happened to the outcome of their department's curriculum committee.

Integration Task Force Operation

The functions of the task force are multiple:

1) Developing the vision for change;
2) Assessing the current status of integration district-wide in relation to the vision;
3) Consensus building: Moving from mission and needs assessment to policy and goals;
4) Collaboration across constituencies to develop an implementation plan which reflects all key areas;
5) Interfacing with existing district and building level restructuring processes; and,
6) Assisting in implementation of the change process at site levels.

1) Developing the Vision for Change

The ***Michigan*** Inclusive Education Project defines its vision for inclusion concisely: same age, home school, full-time regular education placement with support, and notes that the operational assumptions of this definition are 1) that labels do not define placement and 2) that financial and program support must follow students into the general education classroom (Leroy, 1992). Each project has its definition for integrated education, and a variety of strategies for moving local districts in that direction.

Statewide Systems Change Projects reported that the local vision resulted from a group consensus regarding the desired student outcomes of integrated programs. ***Colorado*** staff concentrate on building a common philosophical base in each school for inclusive education values. Strategies they employed included sharing videos and visiting programs where the vision is "being actualized." ***Indiana*** utilizes a variety of needs assessment survey data to negotiate district site agreements which will reflect an outcomes-driven vision. ***Vermont*** reports that the clarity of the state level mission and goals has been helpful in anchoring the vision and goals at the local level. In ***California*** we have found that the local group often needs to acquire a common information base about both best practices and the status of existing local programs before the vision can be fully articulated. For this reason, concurrent with needs assessment activities, task forces generally spend a third to half of each working meeting in self-education activities such as: having guest speakers or panels from inclusive programs in similar districts, viewing videotapes or slide presentations from other programs which reflect best practices, or hearing from members within the group about local curricular and instructional practices. This facilitates exchange and development of a shared information base that will enable participants to: a) assess local needs; and b) develop a consensual vision or direction.

2. *Assessing the Status of Integration District-Wide in Relation to the Vision*

Multiple tools have been developed by the states to guide this process. ***Colorado's*** Effective Education Model (CEEM) Checklist of Best Practices Indicators is used to facilitate assessment of individual site level quality. Similarly, ***Vermont's*** schoolwide planning process utilizes Best Practice Surveys and Action Planning formats. ***Virginia's*** tools include the

Implementation Site Planning and Review Checklist, and the Administrative Planning and Review Checklist. ***California's*** Integration/Inclusive Education Local Needs Assessment (Halvorsen, Smithey, Neary & Gilbert, rev. ed. 1992) provides an instrument for assessing a) the existing district integration/inclusion plan, in terms of all areas from facilities and transportation to personnel, student preparation, related services and curriculum, as well as, b) the current status of integrated programs district-wide in the absence of an existing plan. The assessment process is generally by committee, and can include interviews, program observations, and document review by task force members with interest/expertise in specific areas. Site or building level needs assessment in ***California*** is guided by the project's Implementation Site Criteria for Integrated Programs (Halvorsen, Neary, & Smithey, 1991) and its adaptation for inclusive programs developed by PEERS and CRI in 1991 (Halvorsen, Neary, & Smithey, 1991). Each of these tools provides a standard to guide district assessment.

3. *Consensus Building: Moving from Mission and Needs Assessment to Policy and Goals*

In ***Indiana***, data obtained from parent and educator attitude surveys, principal surveys regarding building level training needs, site feasibility studies, after school and summer school surveys are synthesized and brought to the site agreement phase with each LEA to guide the consensus-building process. The local plan or "program model" is then defined through a series of Implementation Planning Reviews which guide local technical assistance efforts. Specific activities are contained within each site action plan.

California, Virginia, and ***Indiana,*** appear to have operated somewhat differently than many other states in this activity. In ***California*** and ***Virginia,*** the district Integration Support Team or task force, which represents multiple sites, develops the mission and implementation plan, including specific goals, activities, timelines and resources required, across all of the critical areas, i.e. Facilities, Transportation, Related Services, Student, Personnel and Parent Preparation, Curriculum Development, Instructional Strategies, etc. This district level plan then moves in two directions: upward through the administrative approval process, and outward to individual school sites to guide their building level planning effort. In ***California***, PEERS observed that the district level support and concrete plan of action was a necessary framework for school level buy-in. In several other states, action planning begins at the building level, as with ***Vermont's*** Schoolwide Planning Process; and the district level process is reported as being less formal in nature in ***Vermont*** as well as in ***Colorado*** and ***Pennsylvania***.

The geographic and/or population size and diversity of many communities has been a driving force in the need for district level planning in ***California***, as in many similarly impacted states, such as ***Virginia*** and ***New York***. Critical changes in the transportation delivery system, strategies for block scheduling to provide related services in general education and community contexts, providing staff development in either extremely large sparsely or densely populated areas are all issues that require overall planning to ensure continuity of programming across sites and age levels. Whether at district or school site levels or both, the most exciting aspect of this process is its collaborative nature.

4. *Collaboration Across Constituencies to Develop the Implementation Plan*

While all educators and parents participate on teams, from student centered Individualized Education Program (IEP) teams to curriculum and schoolwide planning groups, until recently the vast majority of us received little or no training in how to work as a team member. The ability to collaborate in a nonhierarchical manner, with all contributors having equal status, and each having unique expertise and perspective to add to the process, is an acquired and essential skill (cf., Thousand & Villa, 1990). One early inservice need in the district and school planning process is likely to be in collaborative teaming, utilizing cooperative learning structures not unlike those designed for our students to work together (Johnson & Johnson 1989; Thousand & Villa, 1990).

At the district level, a subgroup of the integration team planning for related services might include general and special education administrators, nursing staff, teachers, facilities and equipment personnel from the central office, as well as parents, therapists and clinicians. A school level team would be equally diverse, and could point the direction toward changes in job descriptions, subsequent issues around "role release," or work schedule alterations. To make these challenging decisions and develop plans to support them requires true collaboration across these constituencies. The planning group itself is then providing a model for the implementation of integration systems change (see *Changing Job Roles,* Chapter 3 and *Activities to Promote Collaboration,* Chapter 4).

The district level plan which evolves from the collaborative efforts of the Integration/Inclusive Education Support Team will cover all essential areas with specific objectives and activities, including, e.g. student groupings and transitions, site selection/preparation, related service delivery, transportation, facilities and equipment, student, staff and parent "inservice" preparation, curriculum, and peer support systems. Perhaps the most important aspect of the district level plan is how it will be brought to the school site level for implementation, and in doing so, how these plans can interface with the local school reform or restructuring process.

5. *Interfacing with LEA and Building Level Restructuring Efforts or the Existing School Planning Process*

Sailor (1991), Skrtic (1990), and many others have noted that special education is now in the best position ever to share in the restructuring agenda. For one thing, students and programs are located at home schools, often for the first time. Students, staff and parents are part of the school community, not visitors or people "renting space" in the building. The process for implementation of local plans needs to capitalize on this sense of community at the site level. A schoolwide collaborative process to adapt the plans to site-specific needs is required. In a wonderful example of this, Colusa High School in rural northern ***California*** put together a team which included everyone from Board members to students, and developed their mission, a needs assessment utilizing quality indicators from several sources, and an action plan for inclusion.

In ***Michigan***, one of the district criteria for selection as a systems change participant is a written commitment that inclusive efforts will be grounded in the LEA restructuring effort. This commitment requires Superintendent, School Board and the Teachers' Association's signed approval. In ***Kentucky***, site-based management teams direct inclusive planning within concurrent overall building reform.

In ***Colorado***, technical assistance and other project activities are blended into the context of school planning, and evaluation questions help to shape the school wide evaluation plan.

The district level integration "support team" or task force can serve as a valuable resource in the actualizing of plans at the school level. For example, members from specific schools can make presentations to their faculty, site councils and student study teams during the LEA planning process, to keep them apprised of events and solicit their input. These representatives can also arrange for site visits from school teams to demonstration programs within or outside the district, and include opportunities for communication with school level teams as a part of that visit. In ***California***, members from the Integration Resource Team in San Lorenzo Valley Unified School District brought inclusive priorities to district strategic planning efforts, which has resulted in several outcomes, such as planned core curriculum infusion in the area of ability awareness education. In Napa, ***California,*** district team members provided ability awareness education to inclusive schools when school teams had adopted this as a goal.

General education restructuring initiatives in many states are on a parallel, concurrent timeline with integration systems change. The primary common feature across these initiatives is their site based orientation, with site based management, shared decision making, teacher empowerment, and active community participation in the life of the school. Special education inclusive efforts bring the infusion of categorical resources (Sailor, 1991) to the systemic restructuring process, enhancing that process and providing new opportunities for all staff and students. In ***California*** two state initiatives, Senate Bill (SB) 1274 (restructuring demonstrations) now in its second year, and SB 620 Healthy Start (comprehensive school-based/linked service delivery) in its first year, provide competitive grants to school sites pursuing these objectives. Interestingly, despite the emphasis in Requests for Proposals (RFPs) on including all students in SB 1274 grants, only 25% of those funded discussed special education in their initial grants. California's State Department of Education targeted those schools for additional training and technical assistance through the California Research Institute, in order to encourage and support schools which have recognized this need.

In ***Pennsylvania***, integration planning at the school level is being coordinated with a major general education reform effort which involves the formation and use of Instructional Support Teams at the elementary level for prereferral, intervention and integration plans. This initiative, similar to those in ***California, Kentucky, Colorado*** and ***New Hampshire***, denotes recognition of the necessity to view and implement integrated education within the larger context of quality education for all students.

Professional Growth and District Recognition

Systems change efforts across the country have noted the importance of recognizing districts and schools that develop model programs, and are providing opportunities for their continued growth (also refer to *Dissemination Section*, Chapter 5).

1) In ***California, Colorado, Pennsylvania, New Hampshire, Arizona,*** and ***Utah***, the State Department of Education and/or systems change projects have developed and provided support to a network of implementation or demonstration sites utilized for visitations, hands-on training, peer-peer contacts (e.g., principal to principal, parent to parent, teacher to teacher) and ongoing professional growth through site networking meetings and annual individualized growth plans (also refer to sections on *Awareness and Skill Building*, Chapter 2, *Dissemination*, Chapter 5, and *Implementation*, Chapter 3).
2) Statewide Newsletters – Projects report utilizing their own newsletter and or statewide newsletters of their Department of Education, parent networks and the like to publicize and highlight model or demonstration programs (***Michigan, Indiana, California, Utah***, and ***Virginia***). Newsletter articles often

focus on a specific student's story, and then move from the student/family point of view to a larger district perspective highlighting strengths of the program, student progress reports, and aspects of the local change process.

3) Co-presentations with personnel from demonstration programs at national conferences such as The Association For Persons with Severe Handicaps (TASH), Statewide TASH chapters and annual general and special education statewide conferences, regional seminars, university-based academies, state sponsored leadership and innovation institutes, were reported by ***Colorado, California, Kentucky, Pennsylvania, Virginia, New York, Indiana*** and ***Washington***. In addition, several states, such as ***New Hampshire, Arizona, California, Colorado, Illinois***, and ***Michigan*** sponsor teams and individuals from demonstration sites to attend conferences and institutes for their own growth.

4) Use Local Media – The "limelight" strategy has been employed effectively in many locations to recognize exemplary programs. In ***Washington*** a half hour local news program featured inclusion and focused on a student and family from one project site. In Davis, ***California*** the local paper's education editor was invited to attend planning/advocacy meetings and then visit the inclusive program on its very first day. This has led to a series of feature articles over a three year period, some of which have been picked up by the neighboring city's media. This strategy not only provides well-earned recognition, but also serves as a prime education tool for the general public.

5) Product and co-authorship of journal articles with personnel from project districts is an activity undertaken by ***Michigan*** to recognize, and support the professional growth of exemplary sites. This is a strategy that provides true credit to the "do-ers" or implementers of local systems change.

6) Specific awards to exemplary sites occur in many locations. ***California*** implementation site personnel receive stipends for visitations and observations in acknowledgment of the preparation time required; ***Colorado*** provides money for site visits and to attend state/national conferences, as well as six days of reimbursed substitute time for each site to utilize as needed.

7) Intra and Inter-District Training – The majority of states noted that their exemplary site staff may work individually or as team members to provide training and technical assistance consultation to sites within and outside their districts, as well as providing or sponsoring building level inservices within their own schools. States such as ***Arizona, Colorado, Utah,*** and ***Vermont*** provide training on inservice techniques to site personnel to enhance their effectiveness as trainers for these activities.

Evaluation

Districts can pose several questions to examine the efficacy of their activities to promote locally-owned change, and specific methods for both formative and summative evaluation can be found in Chapter 6. Questions asked will reflect the local priorities, and might include:

1. Who participated in the change process? Were all key constituencies represented at LEA and building levels?
2. How satisfied were participants with the planning process?
3. Are the planning groups continuing to meet once implementation has begun, to monitor, problem-solve and evaluate the change process?
4. Does the plan have specific objectives, timelines and evaluation criteria for the implementation of change?
5. How satisfied are consumers (parents, educators, students and administrators) of the plans with their implementation?

6. Has the training provided to various constituencies throughout the process addressed their needs? Are participants using that information in local implementation?
7. How effective is the collaborative teaming process? Do members feel their contributions are valuable and meaningful to the process?
8. How has integration systems change become infused within overall school reform? Is there documented evidence of this infusion? Are there plans to facilitate the infusion process if it is not yet in place?
9. Have the policies and plans developed by district and school site teams been adopted by their respective governance structures, i.e., Boards of Education and School Site Councils?

Selected Systems Change Strategies for Facilitating Locally Owned Change

Arizona (1990 – 1995)

Establishes an LEA Integration Advisory Committee and site-based Building Level Support Teams with official Memorandum of Understanding (MOU) between project/district; developed Transition Planning and Technical Assistance (T.A.) Needs Survey which guides plan development, has competitive process to select demonstration sites. Develops training cadres and statewide network.

California (1987 – 1992)

LEA level Integration Support Team (IST) is a requirement for project participation; roles, function of team described in project literature; IST develops district level integration/inclusive education plan, through collaborative process initiated by Integration Needs Assessment: extensive tool covering multiple areas from transportation and facilities to curriculum and instruction; sample missions policies and plans are available that were developed by rural, urban and suburban districts. Also available are Implementation Site Agreements and I.S.T. Criteria, training modules, articles from local media and statewide newsletters, and restructuring demonstration information.

***Colorado** (1987 – 1992)*

State level Integration Consortium met for two years to define issues and design strategies, with goal of consolidating fragmented integration initiatives from across the state; Steering Committee and Administrative Task Force were also broad-based state level groups developing specific action plans. Colorado Effective Education Model (CEEM) Checklist of Best Practice Indicators is utilized to facilitate local needs assessment and evaluation through initial, middle and end of year reviews. One checklist standard refers to the building mission statement and is utilized to bring about a review of that mission by a school committee. Regional training/ T.A. teams are utilized extensively and include both implementation site personnel and other selected field-based "experts".

***Hawaii** (1989 – 1994)*

Hawaii has a current goal of promoting and developing planning teams at district and schools levels, and community participation within these teams.

***Illinois** (1987 – 1992)*

Project technical assistant is assigned to each selected district to assist with futures planning. Each LEA and/or school is awarded monies to assist with staff/parent attendance at institutes, conferences and for materials. Grass-roots parent groups developed at local and state levels.

Indiana *(1988 – 1993)*

State and local LRE Task Forces established; multiple measures utilized for needs assessment through site feasibility study. Site agreements negotiated with LEAs. Statewide LRE conference, Summer Institute, Regional Networking, LEA Inservice provide growth opportunities; at Annual LRE Conference, schools recognized for excellence.

Kentucky *(1987 – 1992)*

District and school-wide task forces are utilized; Quality Indicators Manual has checklist for needs assessment, classroom level growth plans in six best practice areas determine T.A. needs site-based management teams are utilized to coordinate with school restructuring efforts; school achievements are highlighted in newsletter.

Michigan *(1989 – 1994)*

School Coalition and Inclusion Advisory Groups set up at local level; needs assessment appears in project manual. Multi-step training and T.A. process used at building and class level around McGill Action Planning System (MAPS) (Forest & Lusthaus, 1987) and curriculum. Collegial mentoring approach emphasized. Strong state level ties between restructuring and inclusion with the Michigan Quality Education Act (P.A. 25). Local staff recognized through co-authorship of publications, newsletter articles, joint presentations, site visits.

New Hampshire *(1988 – 1993)*

District level or school building integration planning teams featured. Sites determine own needs through regular meetings and develop work plan for growth/T.A. Customized inservices are developed to meet local needs; training utilizes LEA inservice days.

New York (1990 – 1995)

Task forces formed and T.A. process/packet used with on-site consultant to guide needs assessment process. Task forces work under Special Education Director to develop plan. Two phases of training conducted to address districts and teams; sites recognized in local media, as co-presenters with project conferences and inservices.

Pennsylvania (1990 – 1995)

District level task forces are being formed as contingency for LEA selection, three levels of needs assessment (LEA, school, classroom) conducted. Teams have initial training retreat to review needs data and plan activities with project facilitation. Instructional Support Teams at school level are prerequisite for project selection.

South Dakota (1990 – 1995)

Staff assist with LEA self-study to assess needs and prioritize plans; this self-study process is also utilized as criteria for recognizing exemplary practices in districts; educators are encouraged to form their own support networks.

Utah (1989 – 1994)

Broad-based integration task force utilizes Program Quality Indicators; district strategic planning is facilitated by project; educators are recognized through co-training, presenting and authorship of state newsletter articles.

Vermont (1988 – 1993)

Schoolwide planning and student planning teams are primary vehicles for change and best practice implementation; Best Practice Guidelines have received wide dissemination and utilization, used for specific schoolwide planning process.

Virginia (1987 – 1992)

LEAs form Systems Change Task Forces. Statewide and local needs assessment tools developed the following tools: Implementation Site Planning & Review Checklist, Administrative Planning & Review Checklist. Task force develops division-wide action plan including mission, site selection, resource allocation, staff development, parent involvement and program guidelines.

Washington (1988 – 1993)

District level steering committees formed as well as individual building teams. Discrepancy analysis/needs assessment conducted to develop action plans. Local experts use is emphasized. Videotapes highlight model projects, and local media utilized as well.

CHAPTER 2

INCREASING AWARENESS AND KNOWLEDGE OF BEST PRACTICE

By: Ann Halvorsen

Rationale

As we mentioned in Chapter 1, knowledge and understanding of best practices for the education of students with severe disabilities are essential to developing a vision for change and plans for actualizing that vision (Servatius et al., 1992). While some representatives of the key stakeholders in a district may have that *awareness level* information, they may not have had opportunities to *practice* that knowledge or build their *skills* in best practices. This will be especially prevalent in districts where inclusive/integrated contexts have not been developed to date.

Constituencies that have had no prior exposure to these programmatic best practices, such as facilities and transportation personnel, as well as some general educators and paraprofessionals, may lack even awareness level information about the rationale for inclusive education, its research base, program operation, and expected or desired outcomes. Therefore, in order to plan together and implement effective integration, training is necessary to provide a common foundation.

In addition to awareness and skill building inservice education that is focused on best practices content, staff and families will often need training in collaborative team processes in order for a systemic workable plan to develop at LEA and building levels (Rainforth, York, & MacDonald, 1992; Vandercook & York, 1990). And finally, as plans are put into practice, a variety of constituencies will require new information and skills to implement best practices. As with every aspect of the change process, local needs and priorities must guide training. Training needs assessments are critical tools to determine student, parent, general and special education, related services staff, as well as administrative priorities for information and skills development. As this chapter illustrates, systems change states have recognized the variability among communities and are tailoring their activities to meet that diversity by adapting training modules to target groups, developing local trainer cadres or peer coaching programs, and "matching" districts or school sites to similar communities for technical assistance, training and "mentoring."

Activities to Increase Awareness and Knowledge of Best Practice

We are all familiar with the distinctions between awareness and skill building strategies. These can be thought of as steps on a continuum, or as distinct entities based on a "need to know" premise. An obvious example would be Board of Education members who need awareness level information about why inclusive options are important, about who the students are, and the impact of integration on students' educational outcomes and quality of life. They do not need to have the skills to implement inclusive education themselves. Teachers, in contrast need both awareness information and hands-on skills.

Awareness Level

1) Use of Existing Vehicles and Conference Attendance

On the face of it, providing awareness level training may appear to be a simpler task than skill building, yet the sheer volume of awareness level needs is often daunting in itself. This underscores the importance that systems change projects have placed on utilizing existing training vehicles to promote awareness. For example, many coordinate their efforts with ongoing State Education Agency (SEA) or district inservice activities. ***Indiana*** uses State Teacher Association Staff Development Days; ***Colorado*** has infused best practices information into standard paraprofessional training offered in several districts. In ***Kentucky***, statewide inservice programs are utilized to provide awareness information to personnel who work with students that experience severe disabilities. In ***Utah***, creative use of the statewide mentoring program provides a vehicle for two days a month of leadership training over a two year period. As ***Colorado*** noted, "adding-on" to existing events also minimizes both attendees' and presenters' time away from their programs.

Several states, including ***Colorado, California***, and ***Arizona***, capitalize on their SEA's Annual Conference with awareness presentations directed at administrators, parents, and teachers. In addition, most states make annual "pilgrimages" to a variety of professional and parent conferences to get the word out: ***Virginia*** staff make presentations to the State Council for Elementary School Principals and the State Council for Administrators of Special Education, as well as the Community Living Association and other advocacy group conferences. ***California*** staff present at and/or encourage local district staff and families from implementation sites to present at conferences such as Supported Life, Cal-TASH, TASH, the Association for California School Administrators, the California School Boards Association, and the SEA sponsored statewide Parent-Professional Conference. ***Arizona*** (AZ) also includes statewide Association for Retarded Citizens (ARC), AZ-TASH and state/national Council for Exceptional Children (CEC) on their list of critical conferences. Many states noted the need to get the message out more to general education and community audiences.

Several states provide support or stipends for conference attendance to targeted LEA personnel, while other states have held statewide "big name" events to attract key stakeholders. ***Colorado, Indiana***, and ***Utah*** have sponsored annual PEER conferences for students with and without disabilities. The important piece of this or any other inservice level activity is that (a) some type of needs assessment has been given to a sample of each targeted constituency, and (b) both general overview presentations and content specific to those stated needs have been developed.

2) ***Utilizing a Variety of Formats and to Reach a Wide Array of Stakeholders***

States reported multiple formats to reach diverse audiences, including:

a) Multi-media approaches within workshops and presentations utilizing project or state-produced videotapes (e.g., ***Colorado's*** Learning Together; ***Washington's*** parent-developed videotape of an inclusive program; ***Vermont's*** Andreas – Outcomes of Inclusion), slide shows, commercially available films and tapes (e.g., Regular Lives, A Little Help From My Friends).

b) Development of extensive mailing lists and wide dissemination of brochures and newsletters written in layperson's terms, as well as brief articles or handouts describing programs and benefits.

c) Speeches to community groups at their regular meetings, such as: Developmental Disabilities Council; service agencies; and parent, professional and advocacy organizations (***New Hampshire, Illinois, Washington***).

d) Use of loan libraries through the project (***Arizona, Colorado***) and/or State Departments of Education (***California, New Hampshire,*** and ***New York***) which publicize and disseminate project information and products statewide.

e) Development and dissemination of self-instruction packages that will provide introductory awareness activities which educators or parents can implement in their building or community (***South Dakota***), a particularly creative strategy for rural areas.

f) Developing grass roots/parent group presentations, a critical feature of ***Illinois'*** CHOICES/Early Choices Project which, in its first year, went anywhere in the state that two or more parents could come together. The resulting parent network/advisory group Parents for Inclusive Communities (PIC) has a 4,500 person mailing list and receives financial support from the SEA and Developmental Disabilities Council.

g) Coordination of tours or visits to exemplary programs or implementation sites. ***Pennsylvania*** disseminates a descriptive directory of its sites.

h) Development and dissemination of a regionalized consultant bank (***California***) of speakers representing general and special education parents, administrators, teachers, related services, and university personnel that districts and groups can bring in for presentations or consultation. An advantage to this approach is the ability for LEAs to "match" their needs with a practitioner from a similar position, type of district, or community.

i) Teleconferencing or satellite conferences on specific aspects of inclusive education are being used in increasing numbers of states to reach wide audiences, particularly in rural areas.

j) One to two day Leadership Institutes for school principals are a common feature of almost all the states, as are regionalized best practice forums, often co-sponsored by universities affiliated with the project. These are utilized to provide awareness training as well as networking opportunities for district personnel and families.

k) Home School Inclusive Road Shows in ***Illinois***, which utilize many of the strategies listed above and are co-sponsored by the State's Council on Developmental Disabilities (IPCDD) and the Illinois State Board of Education (ISBE). A cadre of presenters which includes state systems change staff, representatives of the Parents for Inclusive Education Communities (PIC) group (see "f"), the IPCDD, and an attorney experienced in civil rights and LRE components of the Individuals with Disabilities Education Act (IDEA) conduct "road shows" approximately once a month for parents, teachers, administrators and school board members.

Skill Building Level

Projects are working collaboratively with either universities, State Departments of Education, or both to provide meaningful skill-building opportunities to districts which will have longevity beyond the systems change project period by (a) institutionalizing training within these frameworks, and (b) ensuring that a large body of skilled personnel at all levels remains after the funding period.

Schattman and Benay (1992) pointed out that two important factors have contributed to the transformation of several ***Vermont*** districts into inclusive school communities: new knowledge and staff development. They noted that districts implementing integrated approaches have an increased need for inservice, yet the traditional compartmentalization of schools has often isolated staff from other staff who have the necessary expertise. These authors further assert that effective inclusive schools have placed a priority on team approaches to staff development, including parents, and utilizing strategies such as "linking with other districts, giving teachers and parents time to meet, involving staff with institutions of higher education and participating in professional organizations" (p. 12). Many of these strategies appear frequently in the activities from systems change states, summarized below.

1) *Coordination and Collaboration with Institutes of Higher Education (IHE) Preservice/Inservice Teacher Training and Research Programs in Special and General Education.*

Each of the projects is affiliated with and/or based at one or more universities in the state, which has provided extensive opportunities for content-specific modules or course design, in-depth institutes and workshops with opportunities for practice, co-teaching of preservice coursework focused on best practices, as well as mutual use implementation sites and coordination with IHE research or model demonstration programs.

A) Joint module/course development and offerings

The University Affiliated Program (UAP) of ***Vermont*** has produced an innovative strategy in conjunction with the University's Continuing Education Division, the Statewide Systems Support Project, and the State Department of Education for one credit practicum courses. This unique course offering requires a minimum of two persons representing a school team and administrative support. Lectures, demonstration and examples from ***Vermont*** schools have been recorded on videotape for use in on-site seminars. Local experts are identified and trained to use the materials and to facilitate seminar activities. Training can be provided to any school in this way, at any time of the year. Participants are taught to work collaboratively and to coach each other, and periodic school visits are scheduled by university staff to observe practicum activities and provide feedback. Topics for which these modules have been developed include: schoolwide planning for best practice improvement, developing instructional support services, classroom accommodation, teaching prosocial skills, teaching self control, and cooperative learning.

1) Content-specific training modules which have been developed in other states include the following:

- Facilitation of individualized planning sessions (MAPS, Futures Planning, 24-hour planning), using a trainer-of-trainers approach in ***Colorado***;
- School Site Team Collaboration for Inclusion, a week-long institute with California State University (CSU) course credit offered by PEERS

through annual SEA-sponsored innovation institutes (***California***) which covers collaborative teaming, essential practices for restructuring and inclusion, school site needs assessment, friendship development strategies, curricular adaptation and alternative instructional strategies, ability awareness education, positive behavior change, integrated therapy and addressing medical needs, school climate, evaluation, and specific school site action planning;

- Facilitated communication, through the Northern ***Illinois*** University Family Academy on Facilitated Communication, which is conducted once each month;
- Effective Schools for All Children, a two-unit course presented in 10 different locations across ***South Dakota*** and coordinated through multiple IHEs;
- Family leadership training for inclusion targeted toward parents of young children and coordinated with two universities in ***New Hampshire***;
- Integrated therapy and curriculum/instructional modifications with Syracuse University in ***New York***;
- Achieving integration, developing friendships, functional curriculum, and IEP development offered as part of university credited institutes in ***Arizona***;
- Medical/Physical Management and Communication Intervention are two courses offered each summer in ***Indiana*** through the project's involvement with five IHEs. In addition, several strategy packets on a range of topics are in development. Summer institutes offered also provide a detailed participant's manual;

- Co-development of several modules with the University of ***Washington's*** Program Development Services for best practices;
- Quality program indicators, communication programming, curricular processes, integrated related services, and specialized healthcare have been developed as modules in ***Kentucky*** where approximately four courses annually are conducted by project staff at the University of Kentucky.

2) As noted above, co-development and instruction of coursework at the preservice level are facilitated as well by the affiliation of most projects with one or more universities. In ***California***, syllabi have been developed and graduate level courses taught by PEERS staff at CSU, Long Beach, Sacramento, and San Diego State University for the mainstreaming course requirement of all general education teacher and administrative credential students, and a course with required fieldwork has been developed and taught annually on inclusive education in the special education option at CSU, Hayward. At CSU, Sacramento, project staff teach courses in legal issues as well as methods within a graduate program which has been designed for students pursuing both general and special education credentials, thus integrating educators during their training program.

In Chicago, ***Illinois***, the Board of Education contracts with Northern Illinois University/Project CHOICES, to teach a course on integration/inclusion for central administrators and personnel associated with the city's Inclusive Schools Project. In addition to having project staff teach courses in IHEs, several states report having developed guest lecturer resource banks of field-based experts (parents, teachers, administrators) to speak on specific topics in selected classes.

In ***Michigan***, project staff are affiliated with three IHEs and have developed multiple courses for general as well as special educators on inclusive education. This type of collaboration is evident in all of the systems change projects. Projects appear to be either (a) located at the SEA with subcontracts to specific universities where regional staff are located, or (b) based at one or more universities with direct ties to the SEA.

B) Mutual training demonstration site development

These strong, IHE-project ties have also led to development of mutual use sites for training, technical assistance, implementation, and research. All of the states are developing model site networks of as many as 25 schools over the five year period. In ***California***, several of these sites were initially developed/supported by the IHE in that region for preservice fieldwork, and related activities. As sites have become incorporated into the state's California Implementation Sites (CIS) network, selection criteria and expectations of the IHE and CIS have been coordinated, and agreements for use have been negotiated among CIS, IHEs, and the sites themselves. This has promoted further collaboration among the three entities.

C) Coordination with research programs and demonstration projects

Finally, many states work with their IHEs to implement collaborative research projects related to inclusive education and systems change, as with ***Michigan's*** tri-level evaluation of placement, support, and programs. These joint research projects assist in disseminating information about best practices and their outcomes through project sites as well as university coursework and publications. In ***Colorado***, CDE and IHE staff meet four to six times a year to review research, discuss potential investigations, allocate joint funding, and discuss research progress as well as teacher training. In ***California***, with the proximity of the California Research Institute (CRI) at San Francisco State University, and the CSU, Hayward affiliation, staff serve on a joint Research Task Force which meets monthly for purposes similar to the Colorado group. PEERS and CRI have developed and implemented two joint studies, and much of CRI's primary research has been conducted in PEERS-identified sites. Joint task forces of this nature also involve additional demonstration projects through IHEs in each state, and facilitate coordination of project activity with these programs, ensuring a valuable link among practitioners and researchers.

2) ***Collaboration with and use of State Department of Education Training Programs***

In each state, the growing impact of systems change projects is evidenced by the collaborative inservice programs that have been established. Every state offers summer or periodic institutes with in-depth skill building components; the majority of states have developed or sponsored leadership training which targets school principals in particular. Existing SEA inservice vehicles are utilized with cross-training to systems change projects, and regional roundtables or Comprehensive System of Personnel Development (CSPD) mechanisms are used to identify current and future training needs. Some examples of these innovative practices are summarized below.

A) Institutes

Some institutes are contracted for and conducted by the universities themselves (e.g., ***Colorado, Utah***), but the majority have evolved through project activity and utilize the SEA's innovation institutes as a means for regional and statewide offerings. In most states, institute tuition for targeted districts/school sites is paid by the systems change project. In both ***Vermont*** and ***California***, institutes on inclusive education are conducted for school site teams, and single participants are ineligible. This strategy ensures that (1) general and special education on-site personnel and parents have extensive opportunities for collaborative team and skill-building, (2) team roles and logistics as well as initial steps in curricular and instructional processes can be negotiated and tailored to the local school context, (3) all the key players receive the same information and make decisions about how to apply that information in their home schools, and (4) the attendance of a representative school team requires administrative support and commitment, which will be crucial to future effectiveness.

In both ***Washington***, and ***South Dakota***, project staff infuse content within their states' week long-summer institutes. Recently, ***South Dakota*** developed a unique Action Lab strategy, where participants will be provided with hands-on learning opportunities in classrooms. The first focuses on modifications and adaptations to support integration, and will be offered in the Fall, 1992. ***South Dakota*** has also initiated a Collaborative Effective Education Design (CEED) Committee. This is an active, statewide coalition of inservice projects to provide consultation and training, and its members have been cross-trained to ensure consistency of philosophy and approach. Many of the modules developed and discussed earlier are used within each state's institutes and are listed in the strategies section at the end of this chapter.

B) Leadership training

McDonnell and Hardman (1989), Servatius et al. (1992), and Stetson (1984), among others have written about the relationship between school leadership and systems change, and specifically, about the need for training to assist principals in meeting the new demands inherent within school designed to include and instruct all children. As Servatius and her colleagues pointed out (1992), "... if business as usual is no longer acceptable for schools, it is also unacceptable in the preparation of school leaders" (p. 3). Systems change projects have recognized the need for radical changes in both preservice administrative preparation as well as inservice to practicing school leaders, and have developed a variety of programs to address these needs.

1) Schools Are For All Kids I: The Leadership Challenge (SAFAK). This program, developed by Servatius, Fellows, and Kelly in 1989 for the ***California*** Research Institute (CRI) with contributed seed money from the California Department of Education, occurs over two days and addresses themes such as creating a vision, effective instruction, promoting staff and student self-direction and building a community of leaders ready to deal with change (Servatius et al., 1992, p. 3), has been delivered widely throughout California and the nation, and has been supplemented by trainer-of-trainer workshops to increase the spread of effect. ***Kentucky, Arizona,*** Louisiana, New Jersey, and Idaho, as well as Guam have utilized SAFAK to train large numbers of school leaders. Roundtable groups have been established for implementers to provide follow-up support in many locations, and the content of SAFAK has been infused into administrative credential programs.

2) Principals' training based on the work of L. Burello (1988) has been implemented in both ***Colorado*** and ***Virginia*** in several regions throughout these states. ***Utah*** uses its mentor program for principals' training, and ***Indiana*** is developing a module for use by IHEs across the state. ***Indiana*** has also developed guides for elementary, middle, and high school principals (The Complete School) which have been distributed to all principals in the state. ***New Hampshire*** has plans to infuse a leadership training module on inclusive education within the effective schools/restructuring agenda.

3) Related innovative practices. Within each state, several SEA-project collaborative practices are utilized to provide skill building opportunities. Regionalized best practice forums are a frequent offering used for both awareness and skill building, such as those for speech clinicians and teacher work groups in ***Kentucky***, and best practices based on regional needs in ***New Hampshire, Illinois***, and ***Arizona***. ***Indiana*** sponsors regional networking sessions in each of its seven special education roundtable regions, with topics such as IEP/curriculum development, integrated therapy, behavior management, and transition planning. In ***California***, regional full inclusion seminars have been sponsored by the SEA with PEERS and state inservice projects, to bring practitioners together for networking, problem-solving and skills acquisition.

Several states have worked to develop cadres of trainers for local and regional use in skill-building efforts. These trainers may work as a regionalized team, as in ***Colorado*** and ***Arizona***, and/or may be representatives of the implementation sites network within the area.

Finally, all of the states report conducting local training in their targeted districts which is designed to meet the specific needs of school and district level staff. Regional, state-sponsored and IHE collaborative efforts serve to augment these trainings.

Evaluation

All of the activities discussed in this chapter are directed toward increasing the knowledge and skills of school communities to include students who experience severe disabilities. The effectiveness of these programs can be examined through several approaches. Questions that states and districts might ask to begin the evaluation process include:

1) Who were the target audiences for awareness level activities? Was a needs assessment or sampling of awareness level needs conducted for each constituency?
2) How was the effectiveness of awareness level strategies evaluated? Have consumer satisfaction and utility of information data been collected? What do the results indicate?
3) Which strategies were the most effective in delivering awareness level information, e.g., conferences, "road shows," incorporation within existing vehicles, materials dissemination, tours or visits to implementation sites, etc.?
4) How were audiences/participants in skill-building activities selected? What types of needs assessment strategies were utilized?
5) How was the effectiveness of skill-building strategies evaluated? What do the data indicate in terms of consumer satisfaction and skill utility?
6) Which strategies were the most effective in skill acquisition? Have follow-up visits, observations to a sample of participants demonstrated positive outcomes?
7) Have modules, courses and presentations been adapted to address local needs as assessed in each community?
8) Has project staff assisted in development of school and district wide plans for inservice delivery?
9) Does the state's Comprehensive System of Personnel Development (CSPD) reflect systems change priorities?
10) How do IHEs rate the quality of courses and modules developed/taught by project staff?

11) Are there collaborative systems set up among IHEs, project/SEA, and LEAs for research, training and dissemination purposes?

Selected Systems Change Strategies for Increasing Awareness and Knowledge of Best Practice

Arizona (1990-1995)

- Awareness Level: Utilizes SEA annual conference and related groups for presentations; loan library for statewide dissemination.
- Skill Building: University-credited institutes offered in several best practice areas; SAFAK trainings for school leaders and teams; regionalized cadres of trainers developed and utilized statewide.

California (1987-1992)

- Awareness Level: Presentations with local district staff and parents to local, state, and national conferences for special and general education; California Department of Education (CDE) loan library for dissemination (Resources in Special Education: RISE), CDE statewide newsletter Special EDge to showcase programs and disseminate best practice information; regionalized consultant bank; site visits to PEERS and other CDE Implementation Sites; co-sponsorship of one-day workshops on a variety of topics (e.g., facilitated communication, inclusion).
- Skill Building: Annual PEERS week-long inclusive education institutes for school site collaborative teams with IHE credit; SAFAK two-day trainings; preservice university course development for general and special educators; coordination with multiple university research and training programs for shared studies and data collection and development of implementation sites for mutual training use; use of California Implementation Site Network for local and statewide training; collaboration with CDE existing inservice

networks for (1) training, (2) systems change planning; (3) and regionalized forums on inclusion.

Colorado (1987-1992)

- Awareness: Use of statewide Directors' meetings to address implementation issues; paraprofessional training offerings across LEAs; use of state fall conferences; sponsorship of annual PEER conference; state-produced inclusive education videotape (Learning Together); loan library for dissemination; SEA and multiple general-special education conference presentations and sponsorship of attendees; use of implementation sites for visits and trainings.
- Skill Building: Trainer of trainers approach to individualized planning sessions; annual week-long institutes through IHEs; collaborative IHE-CDE research and training; regional leadership training; technical assistance provided by four regionalized cadres of trainers, representing school site, district personnel and parents; site networking meetings 3 times a year.

Hawaii (1989–1994)

- Awareness: Sponsores nationally recognized experts at statewide and local meetings.
- Skill Building: Designed and implemented module on functional curricular developments.

Illinois (1987-1992)

- Awareness: Grassroots group presentations and subsequent development of parent network with extensive mailing list and interagency state sponsorship; monthly home-school inclusive road shows, a statewide collaborative effort across agencies.

- Skill Building: Monthly facilitated communication training with IHE academy; IHE-project collaboration with Chicago Board of Education for administrative coursework; guest-lecturer resource bank for IHE classes.

***Indiana** (1988-1993)*

- Awareness: Use of state Teacher Association inservice days; sponsorship of annual PEER conferences; annual statewide LRE conference.
- Skill Building: Summer courses on medical/physical management and communication in collaboration with five IHEs; summer institutes; module for principals training with IHEs statewide, with administrative guides for each level; regional networking sessions on multiple topics.

***Kentucky** (1987-1992)*

- Awareness: Use of statewide inservice programs.
- Skill Building: Development of multiple modules used in project-taught coursework at University of Kentucky; SAFAK leadership and team trainings; regionalized best practice forums for speech clinicians and teacher work groups.

***Michigan** (1989-1994)*

- Awareness: Facilitate visitations across districts.
- Skill Building: Multiple general and special education courses developed and instructed through IHEs; collaborative tri-level evaluation model with IHEs and project sites; collegial mentoring approach utilized for training; summer institutes; collaborative practicum sites with IHEs; model site network.

***New Hampshire** (1988-1993)*

- Awareness: Statewide newsletter; sponsorship of statewide "big name" conferences; one-day workshops on effective inclusive practices; dissemination of a wide variety of materials through the project and University Affiliated Program (UAP).

- Skill Building: Family leadership training on inclusion coordinated with two universities; plans for inclusive education/restructuring module; regionalized best practice forums; facilitated communication workshops; summer institute on administrative strategies.

New York (1990-1995)

- Awareness: One-day leadership training institutes for school administrators.
- Skill Building: Modules on integrated therapy and curriculum/instructional modifications with Syracuse University.

Pennsylvania (1990-1995)

- Awareness: Coordination of tours/visits to exemplary programs; a descriptive program directory.
- Skill Building: Initial training retreat to review needs data with each site; annual conference and institutes.

South Dakota (1990-1995)

- Awareness: Self-instruction packages for state-wide dissemination.
- Skill Building: Effective schools two-unit course taught in 10 locations annually and coordinated with IHEs; infusion of inclusive education content in SEA sponsored institutes; Action Labs hands-on training (module on adaptations); statewide coalition of inservice projects with cross-training.

Utah (1989-1994)

- Awareness: Use of statewide mentoring program for leadership training (skill building and awareness); annual PEER conference.
- Skill Building: Mentor program for leadership training; summer institutes with IHEs.

Vermont (1987-1992)

- Skill Building: University Affiliated Program (UAP) at the University of Vermont and SEA co-sponsorship of several one credit practicum courses on topic such as schoolwide planning and instructional support services throughout the state with videotaped lectures and demonstrations for use in on-site seminars monitored by IHE staff; annual institutes for school site teams on inclusive education. Video tape entitled Andreas - Outcomes of Inclusion.

***Virginia** (1987-1992)*

- Awareness: Parent and professional conference presentations to general and special educators; annual statewide conference on integration.
- Skill Building: Regionalized principals' training.

***Washington** (1988-1993)*

- Awareness: Locally produced videotapes on inclusion.
- Skill Building: Modules on best practices developed collaboratively with University of Washington, content infused within SEA-sponsored institutes.

CHAPTER 3

SUPPORTING THE IMPLEMENTATION EFFORT

By: Morgen Alwell

Implementation is the phase of systems change efforts where goals are translated into action (Comfort, 1982) and has been defined as the stage between decisions and operations (Williams, 1980). A number of implementation theorists and researchers in related fields have studied the implementation of public policies and programs and have examined and identified those interactive factors which potentially facilitate or impede these efforts. They include: *organizational capability, allocation of resources, training, communication, motivation, attitude,* and *bureaucratic structure. Organizational capability* has been defined as a synthesis of administrative and technical skills, communication lines, administrative structure, expertise, and motivation (Williams and Elmore, 1976). *Allocation of resources* refers to the thoughtful distribution of staff, skills, information, authority, facilities, materials (equipment and supplies) and funds. *Training,* which was discussed earlier in Chapter 2, refers to the instruction of all persons involved in the myriad skills integral to successfully implementing change objectives, and includes effective training practices such as observation, discussion, practice, review, follow-up, feedback, and evaluation. *Communication* may be defined as the interchange of information and has been described as the first requirement of successful implementation (Edwards, 1980). For implementation efforts to be successful, the implementers must know what actions they're to take. Communication may be examined in terms of transmission or dissemination, clarity, and consistency. *Motivation* and *attitude* may be summarized as the *disposition* of the implementer, i.e., the level of understanding, attitude (Is the implementer in support of or in opposition to the change ?), and the intensity of an implementer's response toward the implementation effort. *Bureaucratic structure* refers especially to the standard operating procedures of the organization, and its divisions of labor, as well as hints at the critical interplay or possible gap between decision makers and practitioners. The interplay between decision makers and implementers is referred to as specification. Lack of specification ultimately leads to a failed implementation effort.

Each of these interrelated and interactive components is an integral contributor to the overall success of implementation efforts. According to Williams and Elmore (1976), the most critical factor seems to be the capability of an organization to bring personnel together to achieve the organization's stated goals, as was discussed earlier in Chapter 1 on facilitating locally owned change. Bearing these components in mind, an examination of critical aspects of implementation efforts relative to systems reform in education follows.

In Steady Work, Elmore and McGaughlin (1988) reviewed several federal educational reform initiatives and discovered a common theme which contributed to previously failed implementation efforts. This was a lack of specification, or a tendency to substitute external authority (e.g., university experts, regulatory requirements, and legal principles) for the authority and expertise of the internal educational staff. This may be described as reliance on external change agents or experts. The lesson learned is that for educational reform to result in real changes, affecting what and how teachers teach and ultimately what and how children learn, and produce changes in outcomes for students and for our society, there must be direct service staff "buy-in" from the beginning and throughout the reform effort. Practitioners must be directly involved in all phases of systems change: shaping the vision, guiding practice, as well as delineating structure and rule changes. Further, local implementers need to make thoughtful and subtle accommodations for the needs, character, strengths and challenges of the communities in which their programs exist. Thus the importance of internal change agents, as discussed in Chapter 1, is again stressed as a critical factor in implementation efforts.

The current general education restructuring movement is an excellent example of an educational reform effort with direct relevance to implementation efforts. There is evidence that one of the reasons the restructuring movement continues to gain momentum in the 1990s, rather than dying out as have numerous previous educational reform efforts, is the attention to critical systemic change components, especially specification. Teachers and other practitioners, administrators and groups from business and the community, are integrally involved in all phases of the restructuring effort from developing the vision for change, to implementation, to evaluation and fine-tuning. The movement has gained so much momentum that 'restructuring' itself has become almost a synonym for reform, meaning to question fundamental assumptions about education, redefine its purpose, and as a result substantially change the way schools are organized and operated. The essentials of genuine school restructuring briefly include: (1) Changes in traditional roles and relationships, e.g., full infusion and coordination of categorical resources (Sailor, 1991), i.e., where formerly independent programs operated in isolation are re-integrated to become part of the whole, so that all students may benefit from shared resources – examples include changes in service delivery for special education services from segregated to inclusive programs, access to health services at the school site via school-based or linked health clinics, team-teaching of students by general and special educators, shared responsibility among general and special educators for *all* students at a particular site, and community participation in the life of the school; (2) Changes in curriculum and pedagogy, i.e., innovation in assessment, curriculum, and instructional practices; and (3) Changes in the workplace, e.g., site-based management and shared decision making; school organizational autonomy; full infusion and coordination of categorical resources; and community participation in the life of the school (cf., Sailor, 1991; Teacher Magazine, 1992).

Most reformers agree that broad systems change at the top is also essential to nourish change at the local level; true change flows both from the top down as well as from the bottom up. Indeed, as Sailor (1991) articulated, "Effective restructuring is organizationally systemic in nature and must proceed from both directions simultaneously. The set of operations required for school organizational autonomy requires multi-level policy analyses and clear specifications as to the extent of autonomy and flexibility afforded to the school site" (p. 14). McDonnell and Hardman (1989) also discussed organizational change and indicated that "lack of top management support is one of the most frequent causes of implementation failure" (p. 285). Administrative support is essential since proposed special education systems change activities impact not only the special education community, but general education administration, teachers, parents and students as well. Our history and experience with racial desegregation in the schools shows that clear directives from central administration minimize resistance and dissonance. For example, a very clear message is given to district employees, parents and students when central administration makes the commitment to serve *all* children in their neighborhood schools, as opposed to establishing a single "pilot site" in the district. In the former, staff must prepare to serve children in this way whether or not they agree initially. In the latter, there is much more room for expressed controversy and doubt, since a clear direction has not been provided. Additionally, district wide changes are superior to incidental efforts because they facilitate comprehensive planning. They are obviously the most efficient way of dealing with inservice training needs, transportation issues, and provision of related services (McDonnell & Hardman, 1989).

Time is another issue for consideration by implementers. Elmore and McGaughlin (1988) noted that the amount of time it takes for reforms to mature into actualized changes in resource allocations, organization and practice is significantly longer than electoral changes that determine change in policy. Because of this, there is a need for long time frames for large ongoing implementation efforts, as well as shared information on the details of the status of efforts over time. There is also a need for broad and flexible implementation plans to respond to unexpected events. Williams (1980) described the need for modification and discretionary behavior by implementers during all phases of implementation, because of the amount of time it takes to implement innovations and because of the need to accommodate for individual needs. In addition to adapting change to fit local needs, once the vision for change is clearly defined, flexibility is needed with regard to following "traditional" steps. Implementers should bypass unnecessary linear sequences and remain focused on the articulated goals or desired ends of the change initiative. For example, students with severe disabilities presently served in centers or in separate schools in a particular district are to be served in more inclusive settings, dispersed in chronologically age–matched general education classes in their neighborhood schools. To implement this change, there is little need to first establish "special" classes at the general education site. Colorado provides a dramatic example of this, as students with severe disabilities have been moved from institutions directly to general education classrooms.

Finally, a review of the educational reform and systems change efforts clearly indicates that practitioners are to implementation as implementation is to change. They are the vehicles by which reform efforts are institutionalized, ensuring that changes will remain in place when the change agent, in this case the systems change project, no longer exists. Practitioners' individual and collective experiences with the implementation effort, along with measured outcomes of programs for students, generate the questions that will inspire and shape applied research and future reform efforts. In the larger context of broad systems change, it is ongoing implementation of reform efforts that makes articulated changes tangible, expands our knowledge base, and ultimately improves outcomes for all learners, including those who experience severe disabilities.

There are a great variety of strategies available to support the implementation effort and these should be selected based on the expressed needs of the target audience as well as on knowledge of implementation theory and research. What are the critical implementation activities undertaken by the systems change states? The activities which emerged as essential aspects of the implementation effort are as follows: policy modification and development, development of programmatic guidelines, revision of job roles, development of demonstration sites, and modification of service delivery systems.

Activities to Support the Implementation Effort

Policy Modification and Development

Policies, regulations and laws which shape the provision of services to children and youth with severe disabilities exist at national, state, and local levels. Each of these supports the way services have been and/or are currently being provided. The experience of many systems change states is that existing policies, regulations, or laws may indeed inhibit change, and new or amended policies, regulations or laws are needed to support change efforts. For these reasons, systems change efforts often require concurrent changes in existing policy.

Examples of *state* policy change/proposal efforts reported by the state systems change projects include: in ***California***, LEAs require waivers from the state to serve students from "special classes" in general education classes for more than 50% of the school day. PEERS staff monitor the number of waivers requested to make a case to revise the section of the Education Code that requires the waiver. ***California*** also had a financial disincentive in place for LEAs to operate their own programs for learners with severe disabilities, i.e., county offices of education usually received a higher funding support ratio for serving students with severe disabilities. PEERS staff worked with the California Department of Education to successfully eliminate this financial barrier (1988). In ***New Hampshire***, state guidelines which allowed for the use of "time–out" have been revised to mandate the use of nonaversive strategies to manage challenging behaviors. In ***Illinois***, the IPCDD (Illinois Planning Council on Developmental Disabilities), a free standing agency of the executive branch of the Illinois government, has been engaged for the last several years in the drafting of policies and policy implementation that is in concert with the goals and objectives of the systems change cooperative agreement.

At least three states have adopted new policies which have the potential to impact sweeping changes in how students with severe disabilities are educated in their states. ***Michigan*** has adopted a position statement (1992) stating that inclusive education will be the first option for all students with disabilities. ***Vermont's*** ACT 230 (1990) emphasizes success for all students in general education classrooms and paves the way for individual schools to "capture that vision." ***Michigan*** also has a "Quality Education Act" (Public Act 25, 1990) which mandates that every school district must publish information on what they're doing to improve their schools and how many students are not served locally, including who they are and why they're not served locally. The exciting ***Kentucky*** Reform Act (1990) mandates a host of service provision changes which impact students with disabilities, such as the development of family and youth resource and support services, public inclusive preschools, upgraded inclusive primary schools, and site-based management of resources and accountability for student performance outcomes.

Colorado and many other states are in the process of developing policies related to inclusive education with their state boards of education.

These state level policies may be developed or revised in several ways. They may be the result of litigation, as was the case with the litigation that banned the use of I.Q. tests with minority children, or as a result of new developments in educational technologies. A proposed policy/bill must be passed by the State legislature to become a law. This process typically means that a senator(s) or assembly person(s) sponsors it, and the whole legislature votes on it. The bill may be reviewed by different legislative committees who offer input; there may or may not be public input solicited or accepted. Once passed, one or more executive departments may be asked to develop regulations which specify how the law is to be interpreted or implemented. The development of regulations typically requires notification of all concerned parties and public input period(s) (as specified by the Administrations Process Act or APA). The department(s) developing the regulations must show evidence that all interested parties have been notified and that their input has been considered in their decision. The Department of Education or Board of Education makes the final decision on adoption of regulations. Laws incorporate policies, or policies may exist on their own, e.g., a department may develop legal advisories or policies and recommend that school districts follow them. These policies impact state systems change efforts in at least a couple of ways: many districts follow state policies whether or not they are mandatory, and if a dispute arises, the court generally upholds state or state department policy even if it is not a law. Litigation outcomes reciprocally impact changes in laws.

A current example from ***California*** provides a detailed illustration of the regulations development process at the state level:

> Regulations are in development to implement the Hughes bill (Assembly Bill 2643) to ensure that students receiving special education services are treated

with dignity and taught using positive behavioral support strategies, an important component of current best practices (cf., Carr & Durand, 1985; Durand, 1990; O'Neill, Horner, Albin, Storey, & Sprague, 1990). Initially, the bill was developed by an Assembly committee, sponsored by Assembly member Hughes, and passed by the State Assembly and the Senate. It then became law, and amended the California Education Code (CA Ed Code 56520–56524). The law mandates the use of positive behavioral support strategies in managing challenging behaviors exhibited by any persons receiving special education services in California, and requires the development of specific regulations outlining these strategies within an identified time period. The law also mandates a study of current practices in use in the state, the results of which will help guide inservice and preservice training needs across the state. In this case, university experts were called in to draft the initial regulations together with state department personnel. All relevant/ interested parties were notified, and a series of public hearings in various locations throughout the state were organized and overseen by the Advisory Commission on Special Education to respond to the regulations draft. The commissioners then reviewed public input and made revisions to the originally proposed regulations. At that point, the adjusted version was presented by the Commission with representatives from the State Department of Education, Special Education Division, to the State Board of Education (7/8/92); this was followed by another round of public input when all interested parties again had opportunity to comment before the State Board will vote to adopt the regulations. Although the process is lengthy, in the end it will mean that the state itself upholds the rights of individuals who experience disabilities to be treated with dignity using positive behavioral support strategies, without the use of aversive strategies. The adoption of these regulations will naturally result in more widespread implementation efforts as well, as district staff and others work to implement the new law. In this way the change effort is furthered.

In addition to state level change, at the *local* level policies may also need to be revised or developed to support changes in such areas as job roles, responsibilities, and job descriptions, and in class sizes and make–up. For example, ***Colorado*** and ***Vermont*** both have developed new credentials which support changes in job roles for special education teachers (for more detailed information see "Changes in Job Roles" section which follows). Oakland Unified School District in Oakland, ***California*** adopted new "roles and responsibilities" for paraprofessionals which enabled them to implement teacher-designed, direct instruction to students in general education classes and in the community, even without a special education teacher being physically present. These are activities which the prior job description prevented. Numerous school districts across the country have adopted policies which permit and regulate the provision of "community-based" instruction for students with severe disabilities in nonschool environments. In ***Illinois***, a new transition into adulthood law was passed (1991) which mandates that formalized interagency transition planning must begin for all students with significant disabilities at age 14.5. An additional policy revision now put in place in such schools as those in Berkeley, Oakland, Colusa and San Lorenzo Valley, ***California***, is that students with severe disabilities are now counted in the general education contractual pupil count for classes in which they are fully included members.

Each of these new or revised policies supports the implementation effort by eliminating policy barriers to change, by making change "official", and by impacting a widespread group of practitioners, consumers and advocates, as well as the general public.

Development of Programmatic Guidelines

Programmatic guidelines are often developed by systems change projects. These written guides generally reflect the best educational practices to date and serve as expectations for project implementation sites. They contribute most significantly to the implementation effort if they are adopted as standards by state or local education agencies because their utilization can help to set excellent and uniform educational program, school, or district goals and may assist in information dissemination thereby minimizing resistance to change. ***Kentucky*** provides an example of a state which has adopted programmatic guidelines. These were developed by systems change project staff and disseminated to all LEAs and they have been adopted by the Kentucky Department of Education. In ***California***, PEERS Project guidelines are used by the state for all "implementation sites", and sites must work toward meeting specific criteria outlined in the guidelines to retain their status as implementation sites. Each site has an annual growth plan to address any area of need, which is reviewed annually. In ***Colorado***, CEEM Project guidelines have been utilized in their "on-site review" process. In ***Vermont***, the statewide systems change project assisted the state department in the revision of their IEP process which was incorporated into the state LRE guidelines.

Whether or not programmatic guidelines are adopted by the state and/or local school districts, when they are developed and adequately disseminated they enhance the implementation effort especially in the areas of training and communication, specifically, in the transmission of information, and the clarity and consistency of the information provided. They also increase the likelihood that proposed changes will positively impact the behavior of practitioners.

Programmatic guidelines may be developed for local implementers such as teachers, paraprofessionals, and/or related service providers, or persons administering programs such as principals, program specialists, Directors of Special Education, or state department personnel.

They may also be utilized as:

- an awareness level information source regarding current best practices in service delivery;
- a tool in evaluating change efforts (when applied to specific programs);
- criteria for the selection of implementation/demonstration sites;
- a tool to develop action plans to systematically implement changes at a particular site(s);
- a resource to validate the efforts of individuals implementing changes, i.e., to "objectify" their efforts.

Guidelines offer the user a clear framework for organizing their programs using specific best educational practices as markers; for example, inclusive schooling in neighborhood schools, integrated therapy, and/or site–based management of resources (financial, time, personnel and materials); and concurrently encourage the user to adapt the materials and ideas contained therein to their needs and the unique needs of the individual students, instructional teams and schools affected.

Many statewide systems change projects have developed best practice guidelines (as well as other related products) and disseminate these in the form of checklists or manuals. Examples include:

The ***Vermont*** statewide systems change project has developed a manual outlining best practices, and a series of manuals on individual program design. Similarly, the ***Michigan*** statewide systems change project has developed several manuals that cover specific topics in some detail, including inclusive education, building community in the classroom, the instructional process, planning for inclusion, managing challenging behaviors, and systems change. The ***Kentucky*** statewide systems change project has also developed several similar "guidelines," addressing such topic areas as services for children with complex health care needs, quality program indicators for students with moderate and severe disabilities, communication strategies, integrating related services, extended school year services, age–appropriate regular school placement, and alternative portfolio assessment. The ***Virginia*** statewide systems change project has developed programmatic guidelines, as well as a disability awareness manual, a videotape, and "program packets" on: integration, facilitating social interactions, design, delivery and monitoring of effective instructional programs for learners with disabilities, and community-based instruction. Additionally, they have developed manuals for technical assistance providers moving students from segregated to integrated special education sites and to assist local school systems to integrate learners with severe disabilities. ***California's*** statewide systems change project (PEERS) products relevant here include inclusive education guidelines, implementation site criteria checklist and site agreements, a week-long inclusive education team training and module, and a curriculum adaptation manual developed with ***California,*** CRI and ***Colorado's*** project. ***California's*** special education inservice training projects, TRCCI (Training and Resources for Community and Curriculum Integration) and CDBS (California Deaf Blind Services), have also developed several manuals on best practices which PEERS utilizes. The ***Indiana*** statewide systems change project has developed guidelines for peer tutors, summer institutes, and regional inservices. Finally, CRI has developed an Inclusive Education Technical Assistance Planning Guide (Simon, Karasoff, Halvorsen, Neary, & Smith, 1992) (see *Selected Strategies*, Chapter 6 for more information and reference section for complete citations).

Revision of Job Roles

Inherent in changes in the delivery of services for learners with severe disabilities are changes in job roles/descriptions. These changes can support and reflect the overall goals for change, or present barriers to implementing change if they do not accompany the change effort. These encompass all levels of service from the direct service provider to administration, to the provision of technical assistance and training programs.

Special Education Teachers

For special education teachers, changes range from changes in *where* they teach (separate sites and/or classes to general education classrooms) and *what* they teach (developmental curricula to a focus on core curricula and functional life skills), to *how* their services are provided, from direct instruction to consultative and/or collaborative models. In ***Vermont*** and ***Colorado,*** new credentials and job titles have been developed which reflect the change to a consultative model; in ***Colorado***, an "Integration Facilitator" credential is replacing the former "Level 3" credential serving students with profound needs; and in ***Vermont***, a consulting teacher certification has been developed. In ***Kentucky, Michigan,*** and ***Colorado,*** special education teachers are becoming members of collaborative instructional teams. In ***Kentucky***, this is mandated by state law at the K-3 level; in ***Michigan***, at all school levels, e.g., one special educator and three general educators might work with an ungraded group of primary students; at the high school level one special educator might be assigned to a department team serving students in a particular subject area such as English or Art. In ***Colorado***, at least one school district (Commerce City) utilizes multi-age staff teams at the elementary and middle school levels; a special educator is assigned to support all students identified as needing "special" support in the group the team serves and auxiliary staff (computer, library, music) are assigned to teams as well. Obviously these teachers' workdays are very different than if they were teaching in their own separate programs in special classes for students with severe disabilities.

The change from a special class teacher to a support teacher in an inclusive model also includes new job responsibilities and/or a new emphasis on skills formerly required of special education teachers, such as:

- extensive public relations and advocacy work initially to establish and maintain inclusive classrooms/sites;
- collaboration with general educators and administrators, as well as parents, instructional assistants, related service personnel, and special education administrators;
- consultation with and support to general educators;
- adapting general education curriculum across grade levels;
- training and supervising instructional assistants who are dispersed in several locations;
- providing direct instruction to heterogeneous groups of students including general education students; and
- acting as the case manager or team coordinator for individual students' instructional teams.

General Educators

These changes also impact the job roles of general educators. General education teachers now must serve more heterogeneous groups of students as well, with a critical need for accompanying changes in their instructional styles and strategies to successfully meet the needs of groups of diverse learners. Examples include multi-age and ability groups, peer instruction strategies, learning centers, whole language, cooperative learning, and thematic activity-based curricula where the teacher acts as a facilitator, coach and/or guide for actively engaged learners, vs. traditional competitive or didactic models where the teacher most often lectures or acts as the dispenser of knowledge to passively engaged learners. General educators may also be asked to collaborate more with colleagues, perhaps engage in peer coaching and/or team teaching, and provide direct instruction and supervision to students with severe disabilities.

Collaborative Teams

Collaborative service delivery models are operated by *collaborative teams* with their own identities and functions (as mentioned in Chapter 1). The following teams are often utilized.

1. *Individual Student Planning Teams*

   These include students, general education teacher(s), special education teacher(s), instructional assistant(s), related service provider(s), parents, and administrator(s). These teams were formerly "IEP teams"; they develop and implement an individual student's educational program, evaluate his/her progress, solve problems, generate curricular adaptations, facilitate planning sessions and formal support for the student as needed, and share information, challenges and successes. In ***Vermont***, student planning team members rotate the roles of facilitator, recorder, timekeeper, encourager, "jargon buster," and observer to promote role sharing and collaboration. In addition to the tasks already mentioned, ***Vermont*** student planning teams identify training and information needs, improve communication with and support to families, develop long range educational plans for students, and plan students' transition to the next learning environment.

2. *School-wide Teams*

These also include teachers, students, instructional assistants, related service providers, administrator(s), parents (of general and special education students), and interested community members. These teams develop and implement action plans related to inclusive education at their school site, plan how resources will be used, ensure inclusion for all students, work to infuse ability awareness information and materials into existing curricula, secure inservice training for staff and students at the site related to their particular needs, interface with individual student planning teams and district teams to monitor, problem-solve, and evaluate ongoing efforts. In ***Vermont***, both school-wide planning teams and individual student planning teams are central components of systems change efforts. School-wide teams review current practices against best practice indicators, and develop action plans to meet site change needs. They also identify resources which are available to the school, and identify needed changes in school/district policy. One function of schoolwide teams in ***Colorado*** is to translate materials into the native language spoken by families. Other team examples can be found in Chapter 1.

3. *District-wide teams*

These teams which may include more than one district, also include teachers, students, instructional assistants, related service providers, administrator(s), parents (of general and special education students) and interested community members. This team performs such activities as planning for district-wide implementation, obtaining inservices for staff and students in the district, developing, refining and adopting policy and procedures for the district, recruiting personnel, developing and maintaining a library of "ability awareness" materials, assisting parents in advocating for appropriate services, and evaluating the progress of plan implementation. Each district involved with the PEERS project in ***California*** forms such a team, as was described earlier in Chapter 1. For example, San Lorenzo Valley Unified School District's planning team includes representatives from all school site teams in the district. One of their recent accomplishments was to bring their priorities to the district wide planning committee which resulted in establishing ability awareness education as a critical element of the district's overall strategic plan. The newly formed district-wide inclusion task force in Berkeley, ***California*** plans to revise special education teacher and paraprofessional job descriptions as one of their first activities. Other plans include establishing procedures for the provisions of related services, and developing a district report card for students with significant disabilities which matches the district format for typical students but reflects best practice curricula differences.

Related Service Providers

As has been described, inherent in new job roles are changes in the way services are delivered. For example, changes for related service providers include:

- increased collaboration with other professionals and parents;
- participation on collaborative individual student, site, and/or district teams;
- providing direct service in general education classrooms or in integrated settings such as adapted physical education during physical education classes for general education students; and
- consulting with general and special education teachers, students, and others to ensure inclusion of objectives throughout the day, and more successful participation for all students.

A second grade class, in which a student who experienced numerous movement-related challenges was fully included in Berkeley, ***California***, provides an excellent example of these changing roles. The physical therapist who assisted him to perform his range of motion exercises on the floor, also led a small group of other second graders surrounding him in yoga exercises at the same time. When the occupational therapist helped him learn to operate a switch to access the computer, she taught this in the context of the student giving commands to his classmates, playing Simon's role in a "Simon Says" game or controlling the activity in a game of "Red Light, Green Light" at recess. The speech therapist at another elementary school in Berkeley taught whole class lessons alternately with small group lessons, instead of seeing students receiving speech services on an individual pull-out basis. For example, she collaborated with resource and general education teachers to teach a letter writing/pen pal unit to a fifth grade class containing three or four students receiving speech therapy services; during small group times she worked on speech skills in the context of teaching students to play popular board games together.

Paraprofessionals

Changes for instructional assistants include:

- facilitating and supporting social interactions between students with disabilities and their nondisabled schoolmates;
- supporting students in general education classes under the direct supervision of the general education teacher, with consultative support from the special education teacher;
- providing instruction to students in nonclassroom school settings and community settings;
- assisting with adapting general education curriculum, especially incidentally;

- supporting and supervising heterogeneous groups of students, including general education students;
- teaching lessons to small groups or whole classes of heterogeneous groups of students; and
- working in collaboration with other team members at the student, site, and/or district levels.

For example, an instructional assistant in a "full inclusion" program in Berkeley, ***California*** typically provided instruction in reading to one group while the general education teacher worked with the student with disabilities and other students in another group. One afternoon per week the instructional assistant also taught the whole class lessons in conflict resolution while the teacher worked with individual students needing attention. Another example of this was described earlier in the changes in Oakland Unified School District's roles and responsibilities for paraprofessionals.

Principals

As students with significant disabilities increasingly attend their neighborhood schools, building principals' jobs are also impacted. They are becoming responsible for the day-to-day supervision and evaluation of their special education teachers and instructional assistants and their programs. Current changes also imply training needs for all staff, including training on efficient teaming and collaborative skills, as well as on instructional strategies for learners with diverse needs. Vandercook and York (1990) note that principals who demonstrate support of collaborative teaming are much more likely to have successful inclusion at their sites. They may do this by setting an expectation that teachers will collaborate, providing incentives for collaboration, participating as team members, and arranging planning time for teams, as well as providing staff training. At the minimum, it is helpful for principals to convey an attitude of acceptance and appreciation for the unique contribution of each student and staff member at the school. In concert with the school restructuring movement, the new building principal is viewed as less of an authority figure and more of an instructional leader, sharing power with other teachers and supporting teachers to teach.

The principal at Hanson Elementary School in Commerce City, ***Colorado***, is representative of this "new" building principal. Together with his staff, he has reorganized students into multi-age and ability groups, managed by instructional teams. A non-categorical special educator is assigned to each group (preschool, primary, and intermediate) who supports identified students to be fully included members. He has arranged for teaching teams to have planning time during the school day by "block" scheduling, and he provides staff with inservices on collaborative teaming. This school is one of several in ***Colorado*** that has also adopted outcome-based learning for all students.

Principals in ***Kentucky*** are also beginning to implement outcome-based curricula for students, as mandated by the ***Kentucky*** Reform Act (1990). One component is school-based accountability for student outcome performance; if students fail, principals and educators job security may be in jeopardy. This law clearly has direct impact on job roles and responsibilities.

In summary, as with policies and regulations, all related job roles and responsibilities must be scrutinized and appropriate revisions made as the implementation effort progresses. These professionals are in a position to be the practitioners of change. Lack of adjustment at this level very practically impedes movement, while positive changes here serve to support, institutionalize, and reciprocally shape systems change efforts.

Development of Demonstration Sites

Demonstration sites developed for the purpose of furthering systems change efforts are typically selected from those sites in local school districts that effectively serve students with severe disabilities. Their programs may already reflect and embody best practices as identified by systems change projects, or the staff have made a commitment to develop their program. Sites are usually representative of different ages, e.g., preschool, elementary, middle, high school, and post secondary; geographic locations and communities in the state, including urban, suburban, and rural; and types of job roles, e.g., principals, general and/or special education teachers or related service providers, so that visitors may select the site that most closely match his or her particular needs/interests. Visitors to sites may include teachers, parents, care providers, administrators, Board of Education members, instructional assistants, related service providers, and/or school psychologists.

In some instances arrangements for site visits may be made through a site coordinator who is responsible for the entire state or a specific region of the state. The site coordinator(s) may also work with site teams or individuals at the sites selected to secure agreements, develop growth plans, provide technical assistance and support, share information, and evaluate the site against project criteria. Demonstration site visits provide the visitor with an opportunity to observe practical applications of best practices. In ***California***, visits are conducted either as "observations" or actual "trainings", the latter with "hands-on" experiences and feedback; both trainings and observations have specific objectives identified for the visit in advance. Visits may be made on a one-time basis, or follow-up visits may be arranged to accomplish goals. Usually both the site contact person and the visitor(s) complete an evaluation which is shared with the implementation site coordinator upon completion of the visit.

Systems change projects often develop their own demonstration sites, as have the projects in ***Indiana, Arizona, Virginia, New York, California***, and ***Colorado***; and/or they may coordinate their efforts with demonstration site networks already in place in the state as part of the state's special education inservice training unit, as have ***Pennsylvania*** and ***California's*** statewide systems change projects.

In ***Indiana***, the statewide systems change project has developed several model implementation sites across the state to date. In ***Virginia***, districts participating in the statewide systems change effort each select a primary, middle and high school site in their district to receive technical assistance from project staff; those that score above 85% on ***Virginia's*** "Implementation Planning and Review Checklist" then become part of the state's network of exemplary sites. In ***Colorado***, CEEM developed a network of at least 17 sites dispersed throughout the state. Each project year, ***Arizona's*** systems change project works with each of the state's 3 regions to develop a model continuum of preschool, primary, and secondary sites to provide both turn around training "cadres" and implementation sites for training. The ***New York*** statewide systems change project has also developed several project sites to date.

In ***Pennsylvania***, the statewide systems change project expanded on a number of "quality education models" originally used by the state reflecting former best practices (classes for students with severe disabilities on regular, age-appropriate school campuses); presently districts must submit an application to the systems change project to compete and they must make a commitment to developing sites to be selected to receive project technical assistance. In ***California***, three other state level projects share sites with PEERS: TRCCI (Training and Resources for Community and Curriculum Integration), California Deaf Blind Services, and the Positive Behavior Change Project. Together they have a network of over fifty implementation sites across ***California***, representative of all ages, types of abilities, and regions (also see Chapter 2, Section on *Mutual Training Demonstration Site Development*).

Other statewide systems change projects have proposed the development of demonstration sites as well, e.g., the ***Michigan*** Inclusive Education Project plans to develop twenty sites over a five year period, with project staff offering intensive skill training, technical assistance and team building skills to selected site teams for a time commitment of eighteen months per site, five sites per year. ***New Hampshire*** plans to work with six sites in each of their project years 2-4, with site selection based on geographic distribution, site commitment to statewide systems change, and the site's capacity to implement action plans around inclusive education goals.

All of the projects with demonstration sites to support their implementation efforts have also developed criteria for the sites in the form of checklists, contracts, or manuals; a few noteworthy examples are ***Virginia's*** checklist: "Implementation Planning and Review Checklist," PEERS' checklist: "Implementation Site Criteria for Regular Schools" (1991), and the ***California*** implementation sites manual, Guidelines for Maintaining, Supporting, and Utilizing Implementation Sites (1992) (see list at the end of this section for a complete list of activities by state; see also product appendix for complete citations).

Modification of Service Delivery Structure

Service delivery models for students with severe disabilities have gone through dramatic and sweeping changes in the last century. Very briefly, there have been overlapping periods of no schools, followed by periods of residential schools and institutions, segregated public and private schools, special classes at general education sites which initially often did not match the chronological age of typical children present at the site and did not consider natural proportion, and chronologically-age appropriate special classes at general education sites with an emphasis on quality interactions with typical peers. In general, the movement has been toward progressively more inclusion in the mainstream, as noted in the introduction. The reader is referred to Brown, Nisbet, Ford, Sweet, Shiraga, York, & Loomis (1983), Meyer & Putnam (1987), and Halvorsen and Sailor (1990), for a historical review of service delivery models to date. In recent years, a new service delivery model has emerging in which students with severe disabilities are served in general education classes at their 'neighborhood' or 'home' school, that is, the school they would attend if they did not experience a disability. This integration model has become known as full inclusion, inclusive education, or supported education (Forest & Lusthaus, 1989; Snow, 1989; Stainback, Stainback, & Forest, 1989). Numerous authors have discussed the rationale for this model (see Brown et al., 1989a, 1989b; Sailor, Gerry, & Wilson, 1991; Thousand & Villa, 1989). Benefits noted for students with disabilities include that the model facilitates numerous critical aspects of a quality integrated program, such as heterogeneous groupings, natural proportion of students with disabilities, participation in all aspects of school and daily life, and the development of sustained social relationships with typical students and adults. It is replete with benefits for typical students as well, including positive changes in attitude, tolerance and appreciation for individual differences and contributions, appreciation for similarities, perspective on what's important in life, acquisition of cooperative and support skills, and the opportunity to develop friendships with peers who experience disabilities. These benefits have far reaching implications for much needed societal change.

Within this model, several different approaches to service delivery are being tried and are described in detail in the Curriculum Adaptations for Inclusive Classrooms manual developed by CRI, PEERS, and the Colorado Systems Change Project (Neary, Halvorsen, Kronberg, & Kelly, 1992). For school-aged children, these include four primary models: (1) itinerant categorical specialized support; (2)

itinerant non-categorical specialized support; (3) resource specialist as case manager with itinerant support; and (4) team teaching by a general and special education team. In Davis, ***California***, a college community 20 miles from the state capitol, the County Office of Education has operated an inclusive program of the first type for three years in students' home schools. This is a "categorical" group of students with severe disabilities with much heterogeneity across students. The program began with four students in three schools assisted by one support teacher and two paraprofessionals, with an expectation of growth. It grew to ten students among these same schools, all in different classrooms, by the end of the first year. The staffing has remained the same, with one of the three staff as the primary contact person for each school. ***New York*** and ***Vermont*** both offer non-categorical credentials for teachers, such as special education or consulting teacher, rather than specific disability labels. This facilitates the provision of the second model named above, 'itinerant non-categorical specialized support.' The non-categorical approach can work in other states as well, in spite of credentialing constraints. Usually, teachers are permitted to instruct students outside of their certification area as long as this does not comprise the majority of the group. In Paradise Valley, ***Arizona*** the third type of program, 'resource specialist as case manager with itinerant support,' operates in six schools, for 12 students who experience severe multiple disabilities. There are usually two students with significant disabilities in each school, and one paraprofessional to cover those two classrooms. The inclusion facilitator comes to each school on the average of once every six days, and has ongoing contact with aides, resource and general education staff through team meetings. The resource specialist has the immediate responsibility for day-to-day supervision of the program. ***Michigan, Colorado,*** and ***Kentucky*** provide excellent examples of the fourth model; team teaching.

All of the models discussed above can have applicability to older and younger students. The preschool inclusive process is fairly straightforward, particularly when public preschool programs are operated for any student in the district. ***Colorado*** is half way toward their goal of establishing neighborhood inclusive preschools statewide. In Adams County District #14, Commerce City, each of the four elementary schools has a neighborhood preschool on site. Students with special support needs who live in the area are fully included members in the preschools as a matter of course. Oakland, ***California*** represents a much larger school district; all of Oakland's preschool classes for students with severe disabilities are integrated with typical preschool programs such as HeadStart and Child Development Centers. Quality postschool transition programs present more challenges. Many states have developed promising programs located at community colleges. The reader is referred to Sailor, Anderson, Halvorsen, Doering, Filler, & Goetz (1989) and Neary, Halvorsen, Kronberg, & Kelly (1992) for a more detailed discussion of inclusive service delivery models.

Many school specific changes inherent in these inclusive models have already been discussed in previous sections of this manual (see section on "Revision of Job Roles"). They include physical changes, e.g., rooms formerly used as special education classrooms are being used for general education classrooms, computer rooms, or resource rooms for all students; changes in job roles and responsibilities, e.g., general education classroom systems are changing to meet the needs of heterogeneous groups of learners, including changes in the instructional styles of teachers; related service providers such as speech therapists, occupational therapists, hearing, vision, and orientation and mobility specialists are moving toward providing collaborative, *integrated therapy* rather than isolated pull-out models; staff members are working together with each other, students, and parents in *collaborative teams* to best facilitate the inclusion and learning of all students; and changes in the allocation of resources, e.g., as students with significant disabilities are beginning to attend their neighborhood schools there is a parallel *decentralization of services* in the district; this impacts (reduces) student transportation needs and increases those of staff.

Changes at the *district* level include mergers between general and special education, establishing a unified service delivery system.

Changes at the *preservice* training or university level include similar mergers between education departments and specialty areas within each, and new sets of skills being taught to teacher trainees, e.g., collaborative team skills, strategies to facilitate inclusion such as "MAPS" (Vandercook, York, & Forest, 1989) and "Circles of Friends" (Forest & Lusthaus, 1989; Snow & Forest, 1987), and public relations skills.

Changes at the *state* level include changes in inservice units offered, such as those offered by ***Vermont's*** Inservice Project described in Chapter 2. The ***New York*** state systems change project offers a three-part training program at the state level. Phase I, "Training on Quality Inclusive Schooling," was offered in 11 regions across the state and over 1,300 professionals, parents, and community members attended. Phase II, "Training on Teaming, Educational Collaboration, and the Task Force Model," was offered in each region after Phase I. To attend, districts were required to send a team including regular and special educators and administrators, parents, and related service providers. These districts were then eligible to apply for Phase III: at least one year of on-site technical assistance (1 day/month) and a $6,000.00 mini-grant to support task-force activities (mini-grants were co-sponsored by the SDE). In ***New Hampshire***, the statewide systems change project offers a similar statewide inservice program, an extensive skill building opportunity for educational personnel and parents who may choose from several different comprehensive seminars in critical subject areas. They also offer "The Family Leadership Series," a comprehensive seminar for parents who have children with severe disabilities.

Other changes at the *state* level include changes in courses offered through summer institutes; governance changes such as phasing out county operated special education programs (as opposed to district) and having districts bring students back to their home districts and schools; policy changes (refer to section on *Policy Modification and Development* section, Chapter 3); and mergers between departments at the state level, such as that of ***Kentucky***. In ***Kentucky***, the entire Kentucky State Department of Education (KDE) was dismantled in 1990 and reconfigured in July of 1991. This provided an opportunity for significant reform. The Division of Special Learning Needs has also been disbanded; staff members representing "special" education are now assigned to other departments to work collaboratively with colleagues in curriculum, vocational education, professional development, primary education, preschool education, etc. All KDE issues and developments are addressed by "matrix" teams, comprised of representatives of all key stakeholders in the department. Staff are optimistic that providing a collaborative model at the state department level will positively impact the organization of local school districts.

Each of these changes and approaches emphasizes that special education is not a place but rather an individualized set of services to support students' education in their home schools with their age peers. Systems change activities are really about changing service delivery systems.

Evaluation

Evaluation questions for the implementation section include:

1) Have policies which affect the provision of services for learners with severe disabilities been reviewed or revised? Where needed, have new policies been developed? Have efforts been made toward their adoption?

2) Have programmatic guidelines been reviewed/revised/new ones developed? Have they been disseminated/field-tested for usefulness? Are practitioners using them?

3) Have job roles been reviewed/revised/new ones developed? Have relevant credentials been reviewed/revised/new ones developed for: general and special educators; related service providers; paraprofessionals; principals; administrators; etc. Are practitioners involved in and aware of changes in job roles and responsibilities? Are they trained in changes? Are they integrating changes into their performance?

4) Have demonstration sites which embody goals of systems change initiatives been identified/ developed? Has a site agreement/contract been developed and signed and a growth plan developed? Has a procedure for site visits been established? Are interested persons aware of the opportunity to visit sites? Have sites been utilized for visits/trainings? How do visitors evaluate the usefulness of their visit? Are they applying new knowledge gained during visit in their own settings?

5) Have service delivery structures been modified? Have these modifications resulted in increased integration/inclusive options?

Selected Systems Change Strategies for Supporting the Implementation Effort

Arizona (1990-1995)

Demonstration sites required to develop program guidelines. Local advisory councils develop policies and procedures with project staff assistance. Developing model continuum of sites in each region of state at preschool, elementary and secondary levels which serve as training sites and supply training cadres.

California (1987-1992)

Policies modified or developed: refined items in Coordinated Compliance Review (CCR); changed child count questions on annual individualized MIS (Management Information System: CA's statewide system for pupil count data); 1988 Assembly Bill 4074 took away financial disincentive for LEAs to operate own programs; 1991 Senate Bill 806 specifies that integrated sites that exemplify best practices be identified (and that this information be disseminated as well as information on how many students with severe disabilities attend their neighborhood schools: state progress in this since passage of PL 94-142); monitoring number of waivers requested to make change in education code which requires a waiver to serve 'special class' students in general education classes with itinerant support for more than 50% of school day. Programmatic guidelines: PEERS Inclusive Education Guidelines (1991), Implementation Site Criteria (rev. ed. 1991), Curriculum Adaptation Process Guidelines (1991); working with LEAs on case-by-case basis to modify job roles and descriptions, e.g., assisted Oakland USD to revise roles and responsibilities for teachers and paraprofessionals, and Davis USD to develop guidelines for integrated therapy. Sharing implementation sites with three other established state inservice training projects. Developed training module on inclusive education for school site teams (Halvorsen, Neary, Gilbert, & Terry-Gage, 1992).

Colorado (1987-1992)

Revised teacher and other personnel certification standards. Presently: *Level 1:* Moderate Needs (traditionally consultative to general educators), *Level 2:* Severe Needs, and *Level 3:* Profound Needs (with Life Skills focus) becoming *Integration Facilitator*. Work with SDE on restructuring efforts, learning proficiencies; work internally within on-site monitoring to allow flexibility of count data, cross-categorical resource allocation, etc. Developed 17 demonstration sites across state managed by three regional site coordinators. Developed programmatic guidelines to address some areas of liability. Work intensively with districts wanting to restructure service delivery, by: (1) integration facilitator as consultant model to serve students in home schools where there is not a "Level 3" teacher, (2) cross-categorical service provision that allows for special education staff to be part of grade level teams and support learners with a wide range of instructional and affective needs, and (3) advocate team teaching and co–teaching in regular education classrooms.

Hawaii (1989-1994)

Plans include identification and monitoring of state guidelines, policies, and procedures, especially in the area of curricular development, that support the integration of regular and special education programs. Focus on students attending neighborhood schools statewide.

Illinois (1987-1992)

ISBE (Illinois State Board of Education) has a statewide committee on barriers to integrated service delivery. Hold public hearings. Working to change restrictiveness of teacher certification (IPCDD put out $10,000 RFP to IHE School of Education Deans to examine issue); and alleviate funding problems

(IPCDD & ISBE have jointly funded a $100,000 study of the Illinois special education funding formula which provides financial disincentive to inclusion/integration – financial disincentive exists for districts to teach children and youth with severe disabilities in public schools because only 1/4 of staff in private day and residential schools have to be certified). Project CHOICES puts out annual RFPs for technical assistance for districts; most recently only those districts that reflect commitment to inclusion in home schools are eligible (cooperatives and joint district agreements cannot apply). Each selected school and/or district is awarded a grant to be used for staff and parent attendance at institutes, conferences, and for materials only. School or LEA is assigned a technical assistant who assists with changes beginning with the school board, financial reallocation, parent training, curricular practices, friendships and social interactions between students, community awareness, administrative issues, etc. Project CHOICES also working with IPCDD to make changes in preservice training programs for general and special education.

***Indiana** (1988-1993)*

Working with SDE, LEAs, and Indiana's Council of Administrators of Special Education (ICASE) to address policies to support change. Project staff working with State Department of Education (SDE) to write state guidelines on LRE. LEAs invited to apply for ongoing technical assistance. After two years of support, these programs expected to serve as models for other programs in the area. Plans to develop and support model implementation in 27 of Indiana's 64 school corporations over five project years. Mandate shifts in service delivery in models, including changes in teacher/paraprofessional roles, related services, vocational training, and placement of students.

Kentucky (1987-1992)

Assisted SDE in development of model educational policies and in development of policies for outcome based assessment for students with severe disabilities under state education reform. Developed extensive programmatic guidelines for teachers and related service providers (see product appendix). Developed exemplary model sites to reflect a geographical and urban/rural balance.

Michigan (1989-1994)

Drafted a position statement on inclusive education as a first option for all students which also addresses funding issues. Quality Education Act (1990) states that every local school district must publish in a newsletter what they're doing to improve schools and how many students who should be served locally are not, and why. Modification of job descriptions for teachers, ancillary staff and related service personnel. Developing 20 model implementation sites over a five-year period. MIEP offers intensive skill training, technical assistance, and team building at site and student levels for 18 months/site, five sites/year. Service delivery structure and resource allocation changes include emphasis on team teaching.

New Hampshire (1988-1993)

Revised guidelines to support positive behavioral support strategies. Assist interested districts to modify job descriptions. Select and provide intensive assistance to 6 sites annually which demonstrate capacity to implement inclusive education goals. Provide consultation to districts wishing to modify service delivery structures. Offer extensive inservice program of comprehensive seminars at state level to educational personnel and parents. Established professional network of "integration facilitators" called the

Educational Leadership Network made up of educators involved in inclusive service delivery.

New York (1990-1995)

Working with SDE to examine policies related to inclusion. Three phase training and technical assistance process to modify service delivery across state, leading to selection and development of 13 districts as Implementation Sites in first year with 19 more selected to engage in supported planning activities for a year prior to applying for Implementation Site status. In 1992, offered a Higher Education Leadership Training Institute on Inclusive Teacher Education Programs to prepare regular and special education teachers for Quality Inclusive Schooling.

Pennsylvania (1990-1995)

Expanding on already established implementation site base; moving students to home school districts in heterogeneous ability groups. Coordinate efforts with the Instruction Support Teams (General Education Reform Effort).

South Dakota (1990-1995)

Plans to create LRE/Integration guidelines, create a system to review and modify guidelines which promote integration of students with severe disabilities into general education settings; identifying and recognizing districts throughout state who are exemplary in any part of integration process rather than establishing model sites – called "progressive or integration sites."

Utah (1989-1994)

Plans include extensive policy and procedure review and revision to establish SEA, LEA, and administrative support for project activities. Developing implementation sites within selected districts across state; preschool through transition-age programs represented. Focusing on a transdisciplinary, neighborhood school model. Eliminated financial disincentive for integrated service delivery models. Using federal 619 money for preschool integration projects.

***Virginia** (1987-1992)*

Conducted needs assessments with LEAs and made several recommendations to SEAs regarding development of policies and procedures to remove barriers. Developed a number of programmatic guidelines (see product appendix). Special education teachers' jobs changing to consultant model; one LEA has written new job description for teachers as itinerant supporting students in a particular geographical region and age level. Districts participating with Project each selected three sites across age levels to receive T.A. Those sites that scored above 85% on VA's "Implementation Planning and Review Checklist" then served as project implementation sites. Moved students from segregated and/or age–inappropriate sites to age–appropriate integrated sites, also returned students to home districts in rural areas which had formed cooperatives with neighboring districts.

***Vermont** (1988-1993)*

Act 230 passed in 1990, emphasizes success for all Vermont's students in regular classrooms and paves the way for all schools to "capture that vision." Have developed extensive programmatic guidelines (see product appendix). Extensive modification of job roles and descriptions: classroom teachers, administrators, special educators, related service providers. Have developed model sites.

***Washington** (1989-1994)*

Developed guidelines which delineate "best practices" related to social skills, transition planning, integration, community–based instruction and other quality program components (see product appendix).

CHAPTER 4

PROMOTING COLLABORATION

By: Morgen Alwell

The purpose of education for learners with severe disabilities is the same as that for typical learners, to prepare for full participation in community life. Participation occurs through meaningful vocational contributions, preferred leisure activities, and satisfying and sustaining relationships with friends, family, and others in the general community. It also means getting along with others in an interdependent and complex society, adjusting to ongoing change, and managing basic needs. To meet these complex objectives, schools today are not only faced with the challenge of teaching students basic skills, higher order thinking and reasoning skills, social skills, and vocational skills, but also with facilitating the healthy psychological development of students. It is well-documented that separate, isolated educational service delivery models do not produce these outcomes for learners with severe disabilities (Brown, Nietupski, & Hamre-Nietupski, 1976). Often even well planned programs with special classes at chronologically age-matched regular schools do not produce members who are fully integrated in their school and home communities. Therefore, students who experience significant learning challenges are being included increasingly in general education classes with special education support in their neighborhood or homes schools (see *Modification of Service Delivery Structure,* Chapter 3). Readers are also referred to Stainback, Stainback, & Forest (1989) and Stainback & Stainback (1990; 1992).

Vandercook and York (1990), Rainforth, York and MacDonald (1992), and others note that given the varied and complex needs of these students, educational programs must be carefully designed and implemented by teams of individuals, including both students and adults. Each team member and each team contributes unique perspectives and expertise. Their combined efforts provide the information and skills necessary to design and implement effective programs for learners with significant disabilities. *Collaboration* implies that team members willingly work together to achieve agreed upon goals. They let go of individual prominence for the efficacy of the whole and see themselves as equal contributors involved in a nonhierarchical relationship. A positive interdependence develops. Each member is expected to exhibit interpersonal and small group skills that have been described in the literature on cooperative learning groups (Johnson and Johnson, 1989). Collaboration among team members and teams is the key to successful inclusion of students who present significant learning challenges in general education classrooms. Collaborative service delivery is the foundation of successful programs for these learners (cf., Stainback & Stainback, 1987; Thousand & Villa, 1989).

Facilitating collaboration is critical for systems change agents because it also establishes ownership for change effort objectives. As discussed in preceding chapters, practitioners and relevant others must be included in the change effort early on and throughout all phases if they are to truly understand, support, and ultimately implement change objectives.

The need for collaboration may be extrapolated upward to the groups and organizations who directly and indirectly serve students with significant disabilities, including those at district, university, regional, state, and national levels. Selected activities to promote collaboration discussed in detail in this chapter are: public policy forums, course development with Institutes of Higher Education, participation on joint task forces, development of interagency agreements, advocacy group involvement, establishment of statewide advisory boards, involvement of general education, and building-based support teams.

Public Policy Forums

Public policy forums are a vehicle for different agencies/groups with different agendas to come together to review policies with a common goal in mind, e.g., systems change objectives for serving children and youth with severe disabilities. Public policy forums are an example of a type of "topical forum." In general, topical forums are content specific, structured yet interactive presentations by a group or groups of "experts" in a particular topical area. Typically they bring together practitioners, experts, and lay people with different information, experiences, and attitudes to discuss issues and share information in a collaborative spirit. They offer the change agent the opportunity to present important information to a variety of stakeholders in a format that is at once educational and engaging, because everyone present is invited to participate. In addition to public policy forums, a sampling of topics related to statewide systems change for learners with severe disabilities suitable for forums includes: procedures for students with complex health care needs, full inclusion issues and strategies, cooperative learning, integrated therapy, facilitated communication, and transportation. Topical forums may be local, regional, statewide, or larger. Many of the systems change projects utilize topical forums as part of their collaboration/implementation effort. ***Michigan*** hosts two-day regional forums on "mapping" strategies and ***Illinois*** held regional forums on different topics bi-annually.

In ***California***, PEERS offers one-day seminars every spring on full inclusion issues and strategies; PEERS staff also interface with others on public policy forums. In ***Illinois***, Project CHOICES holds similar forums on facilitated communication and on topics of particular concern to parents. Furthermore, they have participated with The Illinois Planning Council on Developmental Disabilities (IPCDD) in the process of reviewing, revising, drafting and implementing policy that is in concert with the goals and objectives of the systems change cooperative agreement.

Course Development with Institutes of Higher Education

Another critical activity for successful systems change is collaboration with institutes of higher education (also refer to *Skill Building* section of Chapter 2 for more information). Information on best educational practices for students with severe disabilities needs to be incorporated into existing preservice and inservice courses and programs offered to practitioners through universities, and new courses developed if revising existing curricula is insufficient. In addition, the knowledge base of university personnel can be invaluable in helping shape the systems change effort. The majority of the statewide systems change projects' staff are affiliated with universities, e.g., ***Virginia's*** statewide systems change project staff are associated with three major universities there: Virginia Commonwealth University, George Mason University, and the University of Virginia at Charlottesville. Within universities, there is also a need for much more collaboration among departments, especially among general education, special education, and related service personnel preservice training programs.

Many of the states we reviewed report that courses are jointly developed by systems change project and university staff. For example, in ***Michigan***, project staff have developed several inclusive education related courses for general and special educators preparing to receive students with challenging needs into their classrooms. Project staff also assist in implementing a network of summer institutes and training programs, and work closely with university staff in implementing collaborative research projects related to inclusive education and systems change in the schools. ***Illinois*** project staff have developed course structures for two graduate level classes on (1) the inclusion of students with disabilities in home schools, regular education classrooms, and local communities, and (2) on facilitated communication.

Participation on Joint Task Forces

Participation on joint task forces is a collaborative/implementation strategy that brings individual and various group representatives together to work on a common cause, thus it also furthers systems change efforts. Joint task forces are generally comprised of representatives of all stakeholders who have a significant relationship to the group's task, and who would be in positions to ultimately enhance or impede the group's objectives. Their participation is sought not only for their individual ability to contribute unique perspectives and expertise to the group, but also to enlist their support in the group's larger mission.

These boards typically represent many agencies and provide an example of joint task forces at the state level. (See part 6, "Establish Statewide Advisory Boards" in this chapter for more information). It is also important for project staff to participate on other agency task forces, e.g., in ***California***, PEERS staff participate on the state LRE task force, Cal-TASH Board of Directors; Supported Life Board; research task forces & university curriculum committees. Systems change agents also typically facilitate the formation of joint task forces or teams within the regions and/or districts where they work. For example, in ***California*** PEERS requires participating districts to create district-wide collaborative integration task forces, as have personnel in San Lorenzo Valley and Colusa Unified School Districts.

Develop Interagency Agreements as Appropriate

In the field of provision of services for children and youth with severe disabilities there are numerous agencies/groups providing independent or parallel services whose effectiveness might be increased if the different agencies shared a common vision. Facilitating the development of interagency agreements is another important collaborative activity for systems change agents. All agency stakeholders at local, regional and/or state levels should be identified and represented in different capacities of the change effort, e.g., included on district-wide inclusion or integration teams. Forums may be set up to address areas of joint concern between agencies and the development of interagency agreements undertaken to coordinate efforts. In ***Washington***, systems change plans include identification of overlapping areas of service delivery and assisting agencies to establish written agreements as appropriate. In ***California***, PEERS assists Special Education Local Planning Areas (SELPAs) and/or LEAs to develop interagency agreements as outlined in their needs assessments. In ***Pennsylvania***, one of the systems change project's primary goals is to establish collaborative relationships with agencies and organizations at state and local levels to promote integration in all areas of community life and at all age levels. In ***Illinois***, the State Board of Education and the Illinois Department of Rehabilitation Services (DORS) have a interagency agreement that any Project CHOICES' graduate who was competitively employed in an individual job site at the time of graduation would automatically become a DORS client for continued support into adulthood. ***Illinois*** also has a relatively new law (passed Spring 1991) regarding transition to adulthood that impacts collaboration between educational and other agency staff to provide formal transition planning for students beginning at age 14.5.

Facilitate Roles for Advocacy Groups within the Change Process

Advocacy groups include professional agency, as well as parent, family member, student, and community groups. These individuals and groups are important source of support for change agents. Their inclusion in the change process greatly strengthens it; likewise, their exclusion has a potentially deleterious effect on progress. Advocacy groups, especially parents, have traditionally been the "movers and shakers" behind systems change. Typically parent representatives and community members are involved on advisory boards, task forces, district and building level teams, and special interest committees. In ***California***, Cal-TASH and Protection & Advocacy Incorporated (PAI) are both represented on PEERS' Advisory Council, and local groups such as Area Boards for Persons with Developmental Disabilities and Community Advisory Council for Special Education are represented on SELPA/LEA task forces. In ***Kentucky***, project staff also work closely with representatives of Protection & Advocacy (P&A) and other agencies. In ***New Hampshire***, the systems change project has initiated the development of a parent task force to develop ways for schools and parents to work together more effectively and to publicize the message of integration at the community level. ***Colorado*** has made an intensive effort to bring advocacy groups such as the Association for Retarded Citizens (ARC), Council for Exceptional Children (CEC), Developmental Disabilities Councils, and parents into the systems change effort. As a result, many of these groups have taken a leadership role in the state, especially parents, who have organized and staffed the PEAK Parent Center in Colorado Springs, a parent information and training center. The Family Support Roundtable was established by the statewide systems change project in ***South Dakota*** to provide an opportunity for parent support groups and advocacy groups to have a collective voice for family services. Members include representation from all the agencies across ***South Dakota*** that provide family support, training or services, and does not include any state agencies. The role of the Roundtable is to make recommendations to state agencies and legislators on the issue of family services and to provide direction in collaborative training for families of children with disabilities.

Establish Statewide Advisory Boards

Participation on joint task forces is a collaborative/implementation strategy with the potential to impact systems change that brings individual and various group representatives together to work on a common cause (refer to a previous section in this chapter for a general discussion of participation on joint task forces). Each of the 16 systems change projects reviewed in this manual was required to develop an advisory board which reviewed project activities as part of their funding agreement. Each project's statewide advisory board was uniquely configured with members that were representative of that state's key stakeholders. For example, ***Indiana's*** systems change project advisory board includes parents and SEA and LEA general and special education representatives from their School Board Association, Department of Education, Association of Public School Superintendents, Governor's Planning Council for People with Developmental Disabilities, Council of Administrators of Special Education, State Advisory Council on the Education of the Handicapped, State Teachers Association, Secondary School Administrators, Association of Elementary and Middle School Principals, Special Education Administrative Services, and the Institute for the Study of Developmental Disabilities.

An initial job of the task force is identifying the advisory board facilitator. This could be the project coordinator or director or it might be a parent and/or the state director of special education or his or her designee, or it may be co-facilitated by general and special education representatives. Statewide advisory board funding needs and sources must also be identified. In addition, all stakeholders who have a significant relationship to the reform initiative, such as constituents across general and special education and related service areas including Health and Developmental Services, who are in positions to shape, enhance or impede systems change objectives should be identified. Their participation is sought not only for their ability to contribute unique perspectives and expertise but also to enlist their support in the reform initiative. Once stakeholders are identified, representatives may be nominated by the agencies or groups selected, or individuals may be invited to join the task force by the project staff. When the group has been formed, it is extremely useful to first establish a common knowledge base through shared information presentations of some kind. The role and direction of the group must also be established. The group may elect to generate issues and concerns and decide the direction(s) it wants to take, in addition to advising and providing feedback to project staff. Policy review, revision and/or development, product development, and/or legislative recommendations are examples of possible directions for the whole group or committees. Expected outcomes and timelines and the mechanisms the board will use to review their efforts and keep them focused must also be identified. Two examples in place from the systems change projects follow.

Kentucky's Systems Change Project Advisory Board includes state agency representatives, e.g., from the Department of Rehabilitation, the Department of Vocational Education, Protection and Advocacy, and the Cabinet for Human Resources; and local school district representatives including special education directors, principals, and teachers. ***California's*** PEERS Advisory Council holds quarterly meetings and was comprised of SELPA directors, County Office of Education Directors, university personnel, general and special education educators, State Department of Education personnel, representatives from the Senate Office of Research, the business community, the Department of Developmental Services, Protection & Advocacy Incorporated, the California Department of Education Preschool Unit, California Teachers Association, California Federation of Teachers, California School Boards Association, parents, general education principals and teachers, Chancellor's Office of the Community Colleges, and representatives from related service personnel, CRI, and Cal-TASH. PEERS advisory board activities included identifying and prioritizing need areas, offering input on PEERS project activities, working collaboratively in committees on agenda items to be promoted/ presented at the state level, promoting board concerns to relevant state agencies, as well as informing constituents of proceedings and conversely bringing information/concerns to the board from constituents.

Involve Regular Educators

A discussion of the rationale for an inclusive service delivery model was presented in Chapter 3. Collaboration among all stakeholders to promote and facilitate inclusive schools and communities is the foundation of this model. If our goal is to provide children and youth, including those who experience significant disabilities, with educational contexts that enhance self esteem and value the unique contributions of individuals; if it is to teach cooperation, caring, social skills, communication and a myriad of basic and academic skills; if our goal is to have graduates from our public educational system possess the skills needed to be fully participating and interdependent members of our society, a society that supports and includes members who experience disabilities as a matter of course, then we must include all children in the mainstream from the beginning. Our success is predicated on our partnership with general educators. They must be involved and represented in all levels of systems change activities. The dissolution of present barriers will be the measure of successful systems change efforts – when "us" and "them" becomes "we," and we truly work together to improve programs and outcomes for all children. General educators have been involved with systems change efforts across the country in a number of ways, including:

- participating in site, district, regional and state trainings;
- participating on student, site, district, and state level teams;
- serving on committees;
- participating on advisory boards;
- co-presenting at trainings and conferences;

- collaborating at the university education department level and at the state department level; and
- collaborating with special educators on restructuring efforts.

Several examples in place from reviewed states follow.

In ***Virginia***, regular educators serve on district-wide and school site teams, they attend all project training events, visit implementation sites, and participate in panel presentations. In ***Washington***, regular educators are represented on the statewide advisory board, project staff have conducted principals' trainings, general education teachers and principals are included in presentations, general educators are involved on site level teams and are included in all site trainings. In ***California***, PEERS staff conduct institutes and trainings/awareness sessions for general educators, students, parents, and other organizations; PEERS and the California Department of Education provided the idea and seed money for the development of "Schools are for All Kids" (SAFAK) trainings for administrators and for site teams; staff are utilized as consultants and trainers in other LEAs; PEERS utilizes general educators as trainers; general educators are active in SELPA integration support teams and are also involved in summer institutes. The emphasis of the ***Michigan*** systems change project is on local development of inclusive educational options. Sites selected for project participation must involve general educators and demonstrate a strong linkage between inclusive education and overall school implementation efforts. General educators also participate on the project advisory board, co-present at conferences and trainings, etc. General educators are also central to systems change efforts in ***Vermont***, where the primary focus of the project is also on collaboration between general and "special" education.

Evaluation

Evaluation questions for the collaboration section include:

1) Have public policy forums been held/planned? Have key persons/agencies attended? Have decisions been made? Have these resulted in significant progress in relevant policy revision/development?

2) Have new courses been developed with institutions of higher education? Have old/outdated courses been revised? How are these evaluated – are new teachers implementing different programs? Have changes been made across preservice training programs? Are these trainings offered as well to practitioners in service?

3) Does systems change project staff participate on joint agency task forces? Have they developed their own (joint agency advisory board) (see #6 below)? Do they encourage the development of joint agency task forces within the districts with whom they work? How often do these meet? Are all key persons identified and invited to participate? Do they? What do/have they accomplish(ed)?

4) Does systems change project facilitate the development of interagency collaboration which leads to the development of interagency agreements?

5) Does the systems change project facilitate an active role for advocacy groups within the change process? Are they identified/included in change efforts/activities? How?

6) Has the systems change project established a joint agency advisory board? Are all relevant agencies and groups identified and asked to send representatives-or are representatives selected? Is an advisory board facilitator selected? Are ongoing meetings occurring? Has the Board's purpose been established? What does this board accomplish?

7) Does systems change involve general educators? How? At the state level, are departments merged/collaborating? Is special education reform linked to general school restructuring efforts? Are general educators involved on task forces and attending conferences? Are they included in trainings and dissemination efforts? At the university level, do personnel collaborate? Have departments merged? Are preservice programs coordinated in terms of content and requirements? At the local level, do district personnel collaborate? Have departments merged? Are district teams heterogeneous? At building level, does the general education principal take ownership for the program/students; provide supervision for special education teachers/staff? Are building level teams also heterogeneous? What about individual student planning teams? Are educators collaborating in the school? Do the general education teachers take ownership/provide instruction for the students? Is general education staff included in all trainings and dissemination efforts? Do they participate as presenters?

Selected Systems Change Strategies for Promoting Collaboration

***Arizona** (1990-1995)*

Project chairperson affiliated with IHE. Summer institute participants receive IHE course credit. Interagency statewide advisory boards comprised of representatives from the Division of Developmental Disabilities, Arizona Association for Retarded Citizens, Rehabilitation Services Administration, AZ Sate School for the Deaf and Blind, SDSE, IHEs and LEAs. Working with statewide parent organization.

California (1987-1992)

Project staff interface with others in state to review joint policy directions. Work closely with IHEs across state. Participate on several joint agency task forces. Work with advocacy and parent groups such as Cal–TASH, Protection & Advocacy Incorporated, and Area Boards for Persons with Developmental Disabilities. Project advisory board met quarterly. Included general educators, students, parents and others in all trainings and awareness sessions; assisted in development of extensive principal and site team training workshops (SAFAK: Schools Are For ALL Kids); developed collaborative school site team institute and training module, and consulted with LEAs in addition to those targeted for project T.A.

Colorado (1987-1992)

Worked extensively with two IHEs in reviewing course offerings and providing feedback regarding teacher competencies when certification was new. Research Consortium: representatives from universities and CDE met with project representatives 4-6 times/year to review research, discuss potential research, allocate collaborative monies, discuss progress, and interface re teacher training programs. Offered paraprofessional training in several districts. Project staff participated on several joint agency task forces, including advocacy groups, adult services, and LEA strategic planning committees. SAB made up of agency representatives, parents, LEA staff, project and CDE staff. General education teachers: invited to attend all trainings and site networking meetings; co–present at local, state, and national conferences; contribute to manual and other product development; can request specific TA from site coordinators; highly involved at site level.

Hawaii (1989-1994)

Promotes community participation and involvement through local discussion meetings facilitated by systems change project. Project advisory board includes representatives from schools, community, parent groups, services providers, and professional organizations. Plans include promotion and development of full inclusion planning teams at district and school site levels; teams to include general educators. Project staff maintain contact with nine member HDE liaison team, representative of all islands comprising the state.

Illinois (1987-1992)

Illinois Planning Council on Developmental Disabilities (IPCDD–federally funded branch of Illinois government) has been engaged for 6 years in drafting policies and procedures that are in concert with the goals and values of Project CHOICES. (The Systems Change Project is combination of IL State Board of Education [IBSE], NIU, and the School Association for Special Education DuPage County [SASED-original IBSE systems change award recipient]). Project staff participate on several joint agency task forces with ISBE and IPCDD. The ISBE and the IL Department of Rehabilitative Services (DORS) have an interagency agreement that any Project CHOICES graduate automatically becomes a DORS client for continued support into adulthood. Parents very involved. Districts with grass roots parent advocacy first to apply to work with project. Have now formed own group: Parents for Inclusive Communities (PIC) with 4500 members. Work with Project CHOICES. General educators involved in all training institutes.

Indiana (1988-1993)

ILREI involves five IHEs. Management team consists of representatives from each of the five IHEs and the Division of Special Education. Field Support

Team established as part of project. Team consists of representatives from Indiana Resource Center for Autism, the Indiana Deaf Blind Project, Augmentative and Alternative Communication Technical Assistance Team, Community Integration Resource Group, and the Northern Central and Southern Electronic Resource Centers. Goal of teams is to establish networking system for training events. Members included on statewide advisory board: parents, SEA and LEA general and special education representatives from the School Board Association, Department of Education, Association of Public School Superintendents, Governor's Planning Council for People with Developmental Disabilities, Council of Administrators of Special Education, State Advisory Council on the Education of the Handicapped, State Teachers Association, Secondary School Administrators, Association of Elementary and Middle School Principals, Special Education Administrative Services, and the Institute for the Study of Developmental Disabilities. Board meets twice a year to review project activities. In response to school restructuring and inclusion activities, general educators increasingly involved, e.g., conference presentations and model implementation. Parent staff are regular participants in statewide teacher inservice events. ILREI sponsors regional networking groups where teachers and administrators can participate in informal problem solving discussions on issues of inclusion and best practices. Annual peer tutor conference. Personnel prep: Project staff participate on the Indiana Special Education Administrators' Services (ISEAS), University Forum which addresses licensing and staffing needs across the state. Coordinates several summer courses through intensive summer institute for teachers and administrators (general and special ed) and developing a module on LRE for use in all teacher training program.

Kentucky (1987-1992)

Advisory Board Subcommittee on Higher Education, facilitated development of Kentucky Executive Interagency Task Force. This group wrote a state interagency transition agreement. Developing course outline for transdisciplinary integrated education in Kentucky's mandated ungraded primary school system. Parents participate in summer institutes and in school-based site teams. Interagency statewide advisory board includes SEA, LEA, IHE, and advocacy group representatives. General educators actively involved in school site teams.

Michigan (1989-1994)

Statewide advisory board includes 23 members, key representatives of constituent stakeholders, meets quarterly. Also a Project Management Team oversees all project activities and directions. Both units assist in policy analysis and development and rule interpretation. Implementation site application process. Selected sites must be linked with local school restructuring efforts. Develop student-based teams at sites. Technical assistance provided to sites at building and classroom levels for one year. Parents key members of student-based planning teams. Provision of awareness and skill training on inclusive education to parents and families. Developed several inclusive education related courses for general and special educators. Staff affiliated with three universities in implementing a network of summer institutes and training programs, and implementing collaborative research projects related to inclusive education and school systems change. Also developing Inter-University Consortium to facilitate curriculum changes in teacher and administrator preparation consistent with inclusive education practices. MIEP maintains a liaison with the Offices of School

Restructuring and Improvement at MDE through the Project Management Team.

New Hampshire (1988-1993)

Public policy activities have included a policy roundtable for state legislative leaders on issues of community development services and family support, a state level interagency committee and cross-agency policy forum to address critical issues surrounding students receiving education in their home school but requiring residential alternatives to their family home, and the formation of a Parent Task Force to develop parent/professional collaboration and community dissemination strategies. All teacher training institutions in New Hampshire participate on a task force which is examining teacher preparation curricula and has developed a profile of personal and professional competencies which facilitate educational personnel to incorporate inclusive practices in their everyday work styles.

New York (1990-1995)

Support Implementation Sites to develop two types of teams: site-based Student Centered Planning Teams and district-level Inclusive Schooling Task Forces. In 1992, offered a Higher Education Leadership Training Institute on Inclusive Teacher Education Programs to prepare regular and special education teachers for Quality Inclusive Schooling. Also, Leadership Training Institute for BOCES Superintendents and other key decision-makers to plan and share models of regional technical assistance and service delivery models to support quality inclusive schooling.

Pennsylvania (1990-1995)

Project Advisory Board is a subgroup of the State Advisory Panel on Special Education and includes general and special education administrators, teachers, parents, principals, and higher education representatives. SAB makes recommendations regarding project goals, objectives and activities, assists in the final review of applications for technical assistance from LEAs, and works to increase visibility of project accomplishments. Nine demonstration sites selected for development each project year. Each awarded $6000.00 minigrants and extensive TA.

South Dakota *(1990-1995)*

Plans include working closely with IHEs to create a system of inservice and preservice training opportunities which support educational professionals in providing services to students with severe disabilities and their families. Plan to write an interagency agreement which allows for communication and coordination of services between agencies for children 0-21 years. Statewide advisory board meets quarterly to oversee all systems change development.

Utah *(1989-1994)*

Project staff engaged in "Coordinating Council for People with Developmental Disabilities" a forum for cross-agency coordination. Involved with state "strategic planning" and public hearings. Collaborate with 2 IHEs in Utah. Involved in development of interagency agreements such as Child Find, Head Start and transition. Teacher union representatives on statewide advisory board. General educators involved at building level, especially in included preschool programs.

Virginia *(1987-1992)*

Project staff all affiliated with IHEs, jointly develop and teach courses. General educators attend all project training events, utilize site visits, participate in presentations and on district and site teams.

Vermont *(1988-1993)*

Vermont's statewide systems change project sponsors several one credit courses throughout the state on topics such as schoolwide planning and instructional support. The format is on-site seminars via videotaped lectures. General educators are also extensively involved with serving students with disabilities in their classrooms. They also participate on site teams and on district teams.

Washington (1989-1994)

Project staff affiliated with IHEs and are jointly involved in developing preservice coursework. Project developing list of preservice training competencies and training materials with IHEs. Plan to identify overlapping areas of service delivery and assist agencies to establish written agreements as appropriate. Statewide advisory board comprised of special and regular educators (teachers' union representative, general education teacher, representative from state principals association), parents, community members, and representatives of other organizations and agencies which provide services to persons with severe disabilities and their families. Conducted statewide inservice training for State Principals Association. Invite general teachers and administrators to trainings. General educators involved on site teams and in site trainings.

CHAPTER 5

DISSEMINATION ACTIVITIES

By: Morgen Alwell

Dissemination activities are critical to an overall approach to systems change. They impact all of the implementation components delineated in Chapter 3, and are an integral part of part of *training, communication,* and *allocation of resources.* Again, the most critical factor in successful implementation of change is probably the capability of an organization to bring personnel together to achieve the organization's stated goals (Williams and Elmore, 1976). Dissemination activities play an important role in the "bringing together" by providing a common knowledge base. They also serve to document systems change activities, promote awareness, build new knowledge, and foster skill acquisition. Dissemination activities effect changes in attitude and potentially positively impact the motivation of target audience members, they fulfill a public relations function for systems change projects, and they ultimately impact the distribution of resources through the sharing of knowledge. They are critical because of the previously discussed need for people to know what actions they're to take to implement change, and to heighten general awareness whether or not individuals are actually practitioners. They may be community members, parents, students, and/or potential advocates.

There are numerous dissemination activities available to the change agent; selections should be made based on familiarity with the target audience, their assumed and expressed needs, as well as on knowledge of effective learning (Brookfield, 1986; Moore, 1988; & Zemke, 1990). Those that follow have been divided into three categories: *presentations,* live and taped; *products,* e.g., newsletters, manuals, videos, and articles; and *approaches,* e.g., trainer–of–trainer models, regionalized approaches, information fairs and statewide mailings.

Presentations

Included here are conferences, workshops, trainings; may be at the local site or district level, or regional, state, or national levels. They may be held on a one-time only basis or repeated in regular intervals such as annual conferences or quarterly meetings, or offered in a time series such as a class. All of the statewide systems change projects reviewed in this manual utilize local and state conferences to disseminate information. For example, ***Utah*** systems change project staff have made numerous presentations at local Council for Exceptional Children (CEC) conferences, university summer conferences, at National AAMR (American Association for Mental Retardation) and The Association for Persons with Severe Handicaps (TASH), and at state and national CEC, Division of Early Childhood, Special Education. ***Utah*** also hosts an annual "Peer Power" conference each February which is attended by approximately 150 "pairs" of peers and buddies with disabilities, who spend 3 days together sharing activities and information. Over the course of the five year ***California*** PEERS project, staff presented annually at Cal-TASH, national TASH, EBASH (East Bay Association for Persons with Severe Handicaps), and several times at ACSA (Association for California School Administrators), CEC (Council for Exceptional Children), Supported Life, Program Specialists Association, Collaboration Conferences, State Special Education Conference, Annual Implementation Site Workshop, CA Parent–Professional Collaboration Conference, Integrated Life, and Phi Delta Kappa chapter meetings. In ***New Hampshire***, staff present at teacher conferences, state education conferences, parent support groups, self-advocacy workshops, TASH (national and regional), New England Regional Resource Center Conference, and CEC (regional and state). Many projects also develop co–presentations with local collaborating or participating sites, and utilize site staff in workshops and trainings, such as

California, Colorado, Kentucky, Illinois, Indiana, Pennsylvania, South Dakota, Virginia, Vermont, and ***Washington***.

Products

Included here are the development and dissemination of newsletters, articles, manuals, and videotapes. All of the systems change projects reviewed in this manual have developed or plan to develop two or more of these. ***Arizona, California, South Dakota***, and ***Utah*** all utilize existing newsletters put out by their state departments of special education; in Arizona, "Special EDition"; in California, "Special EDge," in Utah, "Special Educator." ***Kentucky, Indiana, Michigan, New Hampshire***, and ***Virginia's*** projects have all developed their own newsletters. ***Indiana's*** LRE Reporter is published once a year. ***New Hampshire*** puts out "Innovations," a newsletter directed towards teachers on inclusive education three times a year. "***Virginia's*** Statewide Systems Change Project News" was also regularly circulated. ***Hawaii*** plans to disseminate a quarterly newsletter in their final two project years. ***All*** of the projects have submitted articles in STRATEGIES, CRI's insert in the monthly national TASH newspaper, published quarterly from Fall 1989 to Summer 1992. Project staff and collaborating site staff have also published articles in local newspapers and professional journals, and have utilized local media. Additionally, many projects have developed a number of informative manuals on a range of critical topics. For example (many others too numerous to mention here; see product appendix): ***California*** and ***Colorado*** on curriculum adaptations, ***California*** school site teaming, ***Kentucky*** integrating related services and alternative portfolio assessment, ***Indiana*** three manual series for site principals (elementary, middle and high school), ***Michigan*** inclusion planning process and managing challenging behavior, ***Vermont*** four manual individual program design series, and ***Virginia*** manual for technical assistance providers to assist school districts with change. ***Virginia*** has also developed "program packets" on a range of pertinent topics, such as ability awareness, facilitating social interactions, and community-based instruction. ***Washington*** plans to develop a document delineating preservice training competencies and materials. ***Colorado, Kentucky, Vermont,*** and ***Virginia*** have developed videotapes (***Colorado***: "Learning Together," vignettes of students learning together across ages/environments; ***Kentucky***: Wheelchair Safety Video (and manual); ***Vermont***: "Andreas-Outcomes of Inclusion," experiences of a high school student with severe disabilities who was included in general education classes; and ***Virginia***: "On Common Ground," an 'awareness level' video of students involved in integrated activities). Projects generally make their products available to the public; see product appendix for complete citations and information on ordering. (See also *Development of Programmatic Guidelines* in Chapter 3.)

Approaches

Included here are trainer-of-trainer models, regionalized approaches, and information fairs and statewide mailings. Many states conduct statewide mailings of project products, especially of newsletters. ***Washington*** has developed a mailing list which is updated after each project inservice; it is kept at the state department and available for use by other groups such as IHEs and parent groups. ***New Hampshire*** does intermittent mailings on pertinent subjects to a mailing list of several thousand. ***Kentucky*** has distributed all project manuals statewide, to all school districts. ***Arizona*** and ***Utah*** also plan to distribute their project products this way.

Some projects employ trainer-of-trainer models to assist in their dissemination efforts, most notably ***Arizona***, where a trainer cadre system is utilized: team members selected from model demonstration sites or individuals may apply; they receive year long training at their site, plus an additional week of training. SDE and/or systems change project pays for substitutes for training released time. School districts must make the commitment to release personnel at least three days/year to do technical assistance for others. Cadre members also present at summer institutes and conferences. The length of their commitment is open-ended. ***Colorado*** also utilizes training teams, called CEEM teams; they conduct trainings in "Individualized Planning Sessions" and behavior management, and consist of consumers, general and special educators, and related service providers who are trained for 3-5 days, and make the commitment to do "turn around" training of at least two other groups within following year. ***Colorado*** also utilizes regionalized technical assistance teams, comprised of building level administrator, parent, general and special educators, and related service providers. CDE coordinates requests for technical assistance from LEAs. ***Utah*** trains trainers through the Utah Mentor Teacher Program. ***Pennsylvania*** plans to develop an "outreach technical assistance program" in the third year of their project where trained team members would provide technical assistance to peers from new teams on a regional basis. Trainer-of-trainer models are an excellent vehicle for building internal capacity for systems change.

Most systems change projects employ a regionalized approach to dissemination, dividing the state into regions based on population centers and geographical considerations. Workshops, meetings, or trainings are then offered by regions both for convenience and accessibility for participants and to better address any unique regional needs. ***South Dakota's*** systems change project coordinates their efforts with all other state and federally funded projects and utilizes the same four regions as other projects for training and dissemination activities. ***Illinois*** offers day-long seminars twice per year in northern and southern regions of the state as part of the four trainings they conduct annually. ***Indiana*** has divided their state into seven "roundtables" to facilitate local networking. ***Pennsylvania*** has been divided into western, central, and eastern regions with a regional systems change coordinator assigned to each. Due to ***Hawaii's*** unique geography, project staff plan inservices for each island.

Another dissemination vehicle is to utilize existing vehicles such as "information fairs," workshops, inservice days, or conferences sometimes offered by local school districts or local plan areas (see Chapter 2, Awareness Level Activities; *Use of Existing Vehicles and Conference Attendance, Stipends,* and *Utilizing a Variety of Formats to Reach a Wide Array of Stakeholders,* for a complete discussion of these strategies with examples from statewide systems change projects). As ***Colorado's*** project noted, making a point of adding all project events onto other events happening in the state minimizes travel time away for participants, and makes attendance more convenient. Many projects also offer stipends to individuals or teams for attendance at events. Many events may be taped for later use of information/proceedings, and many states are now making use of new technologies such as teleconferencing or satellite conferences to reach wide audiences, particularly in rural areas. See the selected strategies section following for expanded information on activities utilized by projects.

Evaluation

1) What products have been planned, developed/revised, and disseminated? Who are they developed for, i.e., have all key target audiences been identified and included in some way? (Included here are the development and dissemination of newsletters, articles, manuals, and videotapes.) How have practitioners utilized/evaluated the products? Have the products impacted the implementation of change goals?

2) What presentations have been planned, developed and carried out? Who are they developed for, i.e., have all key target audiences been identified and included in some way? (Included here are conferences, workshops, trainings; may be at the local site or district level, or regional, state, or national levels.) How have participants evaluated the presentations? Have the presentations impacted the implementation of change goals?

3) What approaches to dissemination have been selected? (Included here are trainer-of-trainer models, regionalized approaches, use of existing vehicles, and statewide mailings.) How have participants evaluated the efforts of training teams? regionalized fairs, etc.? Have the approaches selected successfully impacted the implementation of change goals and been efficient in reaching all relevant constituents?

Selected Systems Change Strategies for Dissemination

Arizona (1990-1995)

Present at conferences. Contribute articles in ADSE's quarterly newsletter, "Special EDition" and in the southern region's networking newsletter. Developing and maintaining a resource library. Utilize multiple mass mailings of project flyers, conference information and training events, as well as request forms for technical assistance. Plan to distribute Best Practice Manual to each district statewide upon completion. Developing and utilizing a trainer cadre system: team members selected from model demonstration sites or individuals may apply; receive year long training at their site, plus an additional week of training. SDE and/or systems change project pays for substitutes for training release time. School districts must make commitment to release personnel at least three days/year to do TA for others. Cadre

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members also present at summer institutes and conferences. Length of commitment is open-ended. State divided into three regions (northern, central, and southern) based on such factors as size and location of population centers, distances and travel time within center, and ethnic and cultural similarities.

California (1987-1992)

Numerous conference presentations. Developed and presented training with site staff. Provided stipends for teams and others to attend conferences and trainings. Developed articles, chapters, checklists, materials, and manuals (see product appendix). Conducted mailings with conference information and requests for sites and individuals to present at state and local events. Developed "consultant bank" across state for training. Offered regionalized trainings, especially in rural areas. Offered week-long summer institute sessions for general education and special education site teams which include parents in different regions of state each year.

Colorado (1987-1992)

Numerous statewide and local area conference and workshop presentations by project and affiliated site staff. CEEM provided stipends for teams to attend annual statewide special education conference and national TASH (one team per conference). Developed videotape, manuals, articles, guidelines, brochures, and checklists (see product appendix). Distributed conference announcements and other appropriate mailings statewide, made mailing lists available to others such as Colorado-TASH. Developed training teams to conduct trainings in "Individualized Planning Sessions" and Behavior Management. These consisted of consumers, general and special educators, and related service providers who were trained for 3-5 days and then made a commitment to do "turn around" training of at least two other groups within the following year. Also developed and utilized regionalized TA teams, comprised of building level administrator, parent, general and special educators, and related service providers. CDE coordinates requests for TA from LEAs. Provided regionalized principals' trainings.

***Hawaii** (1989-1994)*

Have collaborated with HDE, local parent associations and service providers to sponsor a number of nationally recognized professionals at statewide symposia and community forums on critical issues such as full inclusion and positive behavioral supports. Many of these individuals have also provided direct consultation to local programs. Provide inservice training sessions and workshops on critical topics. Plan to increase technical assistance to neighboring island local school districts, and to disseminate quarterly newsletter in last two project years. Have developed module on functional curricular development (see product appendix).

***Illinois** (1987-1992)*

Presented at numerous conferences and workshops throughout state. Project CHOICES/Early CHOICES held four formal training institutes annually to provide training for participating general and special education teachers, parents, school board members and administrators: 1) Summer institutes used to prepare districts who were to be sites for the coming school year; 2) Offered workshops and pre–conference and conference sessions at annual IL-TASH Conference each spring, as well as facilitated networking meetings and socials; and 3) Day–long topical seminars offered regionally (two in south and two in north) based on survey of sites' needs and interests. Staff involved extensively in training others in "facilitated communication"; have also done "Home Inclusion Road Shows" to increase visibility and heighten general awareness once per month in different parts of the state. Developed manual for parents and youth, a school checklist for inclusion, guidelines for school districts implementing inclusion, teacher checklists, home school inventory, and course structures on inclusion and facilitated communication.

***Indiana** (1988-1993)*

Numerous conference presentations. Staff contribute articles to existing parent and professional newsletters, and a project newsletter, the LRE Reporter is published biannually. Manuals developed for principals, Peer Tutor Conference, Summer Institute, and Regional Inservices (see product appendix). 8,000+ mailing list updated on an ongoing basis, includes school and agency personnel and parents and utilized to disseminate newsletter and training information. State divided into 7 roundtables. Project staff involved in trainings in roundtables per request. Regional networking sessions conducted to insure personnel are targeted in each roundtable.

***Kentucky** (1987-1992)*

Co-presented at several conferences with site teams. Developed project newsletter and several manuals, a video, and guideline papers (see product appendix) for teachers and related service providers. All products disseminated to all districts statewide. One elementary team and one high school team have been trained to deliver SAFAK II (Schools are for All Kids, Part II: School Site Training) trainings, and have also assisted in project trainings.

***Michigan** (1989-1994)*

Numerous conference presentations. Developed several manuals, semi-annual newsletter, articles, chapter, and research, (see product appendix.) Local educators who have participated in trainings utilized as local facilitators and co-trainers at summer institutes and regional support meetings.

New Hampshire (1988-1993)

Organized activities such as workshops, inservices, and conference presentations. Project newsletter: Informational materials on pertinent subjects mailed intermittently to a mailing list of several thousand within the state.

New York (1990-1995)

Support Implementation Sites to develop two types of teams: site-based "Student Centered Planning Teams" and district–level "Inclusive Schooling Task Forces." In 1992, offered a Higher Education Leadership Training Institute on Inclusive Teacher Education Programs to prepare regular and special education teachers for "Quality Inclusive Schooling." Also, offered Leadership Training Institute for BOCES Superintendents and other key decision–makers to plan and share models of regional technical assistance and service delivery models to support quality inclusive schooling. Three phase training and technical assistance process to modify service delivery across state. Selection and development of 13 districts as Implementation Sites in first year with 19 more selected to engage in supported planning activities for a year prior to applying for Implementation Site status. Phase I, "Training on Quality Inclusive Schooling," was offered in 11 regions across the state. Phase II, "Training on Teaming, Educational Collaboration, and the Task Force Model," was offered in each region after Phase I. To attend, districts were required to send a multi-disciplinary team. These districts were then eligible to apply for Phase III: at least one year of on-site technical assistance (1 day/month) and a $6,000.00 mini-grant (co-sponsored by SDE) to support task–force activities.

***Pennsylvania** (1990-1995)*

Plans include development and dissemination (through co-sponsored regional workshops, trainings, conference presentations, etc.) of a variety of written materials: informational brochure, detailed booklet containing model site descriptions, newsletter articles, written guide for districts regarding development of integrated service delivery models, training modules on a variety of topics (collaborative team building, developing and nurturing social relationships, transition planning, systematic instruction, individual integration planning process, functional assessment, and IEP writing).

***South Dakota** (1990-1995)*

Numerous presentations at state and local conferences. Local presentations often include local staff representatives. Articles submitted to all established agency, state and advocacy group newsletters. Statewide mailings of inservice and preservice offerings as well as information on Project services conducted through SDSE Office. Plan to utilize "trainer of trainer" approach in CEED regional activities. Coordinate with all federal and state funded projects in South Dakota, follow their regional system of 4 regions for training and dissemination activities. "Integration Primer" manual in development, and related "Action Packages" which will explore topics in depth (see product appendix).

***Utah** (1989-1994)*

Present at numerous local, state, and national conferences. Annual "Peer Power" conference. Project and participating district staff write articles for SDSE newsletter, Utah Special Educator. Developing videos in conjunction with the University of Utah. Train trainers within districts through the Utah Mentor Teacher Program. Plan to disseminate all project materials to interested LEAs and SEAs.

Vermont (1988-1993)

Present at conferences. Developed numerous newsletters, articles, manuals, videotapes, etc. (see product appendix). Conduct statewide mailings.

Virginia (1987-1992)

Numerous presentations at national, state, regional, and local conferences and workshops included parents, administrators, general and special education teachers from implementation sites. Developed project newsletter, Virginia Statewide Systems Change Project News. Developed several manuals, articles, videos, and other materials (see product appendix). State divided into northern, southwest, and southeast regions, a coordinator for each provided TA for that region.

Washington (1989-1994)

Co-present with individuals and teams at several state, regional and local conferences. Developing written document which delineates preservice training competencies and related training materials and methods with IHEs. Quality indicators document, resource listing, needs assessment tool for school districts, and overall systems change manual also in various stages of development and dissemination (see product appendix). Utilize regularly updated statewide mailing list from SDE to notify persons regarding project services and events, conferences, etc.

CHAPTER 6

EVALUATING CHANGE

By: Patricia Karasoff

Rationale

The activities involved in changing systems, whether educational programs at the state, local, or district level, involve a process of weighing alternatives, and finally taking action toward those choices most likely to achieve the desired goal. The process of moving toward more integrated and inclusive educational programs involves a number of activities designed to create change at various levels. The information used to make decisions about the effectiveness of these activities and strategies described in earlier chapters are obtained by using a variety of evaluation formats. The types of evaluation strategies used within systems change initiatives can be broken down into several different categories, each providing information about critical aspects of the system involved in the change. The evaluation strategies themselves are developed in response to the critical questions posed by those involved in the change process, and can be grouped into the two major types of evaluation; formative and summative.

Formative and Summative Evaluation

The role of formative evaluation is to provide ongoing feedback to decision makers so that program improvement can be made. The techniques utilized by the external change agents to facilitate the change process may themselves be the target for the collection of formative evaluation data. Process data such as these provide essential information during the change process regarding what is working and what needs modification. Data collected from this type of activity are gathered during the project term and are used to make modifications and improvements to the strategies currently being utilized. External evaluations of systems change efforts are an excellent example of formative evaluations. The term formative simply refers to the point in time within the project period the evaluation takes place. Therefore, such evaluations are undertaken midcourse as opposed to summative evaluations which are conducted at the conclusion of the project term or at the conclusion of a specific activity.

In addition to examining whether the activities undertaken are being carried out as planned, another critical purpose of evaluation is to determine whether or not the activities once completed have had the desired impact, and whether or not the system actually has changed as a result of these efforts. Therefore, summative evaluations are designed to determine whether or not there is evidence that the system has changed in the direction initially charted by the key players. In order to examine these questions the following aspects of the systems often become the target for the evaluation questions. For example, has the program itself really changed? This is often measured by conducting a pre and post assessment of the programs, utilizing program evaluation tools such as best practice instruments for program review. Furthermore, IEP analysis instruments, schedule analyses and social interaction assessments tools are used for evaluating more specific programmatic changes. In addition, an area often examined are changes in the attitude of students and teachers regarding the program utilizing pre and post attitude measures. To assess institutionalized systems changes, those policies and procedures in place before and after the change initiative are often examined to determined is any modification has been made. In addition, descriptive data such as a frequency counts of the number of students who have moved to integrated and inclusive programs is a common type of data collected longitudinally in order to quantify the changes made over time. These summative types of evaluations are, as described earlier, conducted at the conclusion of the project term or a specific activity.

Why Evaluate?

Evaluations are conducted for numerous reasons as have been described earlier in this chapter. They can be carried out as desired either at midcourse (formative), or at the conclusion of the project period or at a designated time period (summative). The primary reasons to evaluate include: (a) a need for information to modify the project (Process Evaluation); (b) to provide data to serve as evidence that outcomes were accomplished (Outcome Evaluation); and (c) to demonstrate program effectiveness (Impact Evaluation). When combined these data can then be used to rally support for future efforts. The methods and instruments used to gather data in response to these various evaluation functions are different.

In order to thoroughly evaluate the systems change effort, objectives to be achieved at the state, local district and school site must be clearly articulated at the outset. The goals and objectives, activities, and accomplishments can then be evaluated either midway through the project (formative) or at the conclusion (summative) as is appropriate. Regardless of the point in time the evaluation takes place, the following three types of evaluation will provide decision makers with vital information: (a) process, (b) outcome, and (c) impact.

The primary focus of process evaluation is to determine whether or not the project is being implemented as planned. Critical evaluation questions at this level are as follows: (a) Have the activities been carried out as planned? (b) Have timelines been met? (c) Have the numbers and types of individuals projected to be affected really been reached? (d) Have the activities undertaken been consistent with the overall goals of the effort? (e) What has worked well and what have been the keys to success? (f) Have any barriers been encountered? If so how were they overcome? and (g) Were revisions made to original plans? If so, why?

Once it has been established whether or not the activities have been conducted as intended, another type of evaluation determines whether or not the goals and objectives of the activity have produced the desired outcome. Therefore, outcome evaluation questions are focused on answering the following types of questions: (a) Have the goals and objectives of the project been reached (in accordance with an agreed upon criteria)? (b) What has happened as a result of meeting these objectives? (c) How many individuals have been affected? and (d) Have any state activities influenced the achievement of project goals?

Finally, since true systems change can be deemed truly effective if it sustains itself despite changes in key players, the long term impact of the activities undertaken can be examined by exploring the following impact evaluation questions: (a) Have the accomplishments of the project activities resulted in any long term effects, i.e., truly systemic change in the delivery and quality of integrated and inclusive programs to students with severe disabilities throughout the state? (b) Are the best practice indicators for integrated and inclusive education in place? and (c) If follow up data are available do they reflect the desired long term changes?

Several critical evaluation strategies are utilized by the systems change efforts. Those which emerged through a review of the 16 states' effort will be presented in this next section.

Evaluation Strategies

The evaluation strategies typically used by systems change project are described in this section and are broken down into process, outcome, and impact evaluation methods.

Process Evaluation

External Evaluations

External evaluations are an example of process evaluations in that they are conducted during the project term. They are designed to provide an external "expert" perspective and to enable those involved in the change to make mid course corrections to move closer toward the desired change. ***Virginia, Pennsylvania,*** and ***Michigan*** have conducted these evaluations to date by hiring independent evaluators to examine the activities, strategies, and accomplishments to date of the project and to make recommendations for change if appropriate. The Discrepancy Analysis Worksheets (Karasoff, 1991) (see Appendix C) are useful in determining the project's current status across all key systems change activity areas, and have been used by ***Pennsylvania*** for this purpose. Additional midcourse evaluation data are provided by all projects via quarterly reports outlining accomplishments toward the achievement of project objectives and any amendments to originally planned activities.

Outcome Evaluation

Program Evaluation

A common goal of all the projects is to improve the educational services being delivered to students with severe disabilities in integrated or inclusive settings within their state. Therefore, program evaluations are conducted to determine whether or not the desired educational changes are evident in targeted sites.

1. Best Practice Instruments

Best practice program evaluations are conducted by all state systems change projects. These tools are used as a needs assessment to determine "what currently exists" within a program against a "best" educational standard which is "what should be." The best practices utilized by the states are literature and practitioner-based. The data gathered with these instruments assist with planning and with the establishment of goals for the change process. Additionally, they are used as outcome measures providing a standard against which pre and post measures can be taken.

Vermont utilizes The Best Practice Guidelines for Meeting the Needs of All Students in Local Schools (Fox & Williams, 1991) to determine areas in need of improvement. The guide is used by school teams to examine their program against a set of best practices and to then determine the teams level of agreement, level of need for improvement, and priority status of each best practice for their program. The results of this assessment then provide the priority areas for school improvement plans.

Virginia examines school improvement by conducting a review of each implementation site across four critical systems planning areas and seven best practice components utilizing the Administrative Planning and Review Checklist, and the Implementation Site Planning and Review Checklist, respectively. Both pre and post data are collected and are then summarized across all sites annually.

The ***Colorado*** systems change effort is focused on the full installation of components of the Colorado Effective Education Model (CEEM) within each of the project implementation sites. To determine the current status of each site the project uses a standards checklist based on the CEEM model. Project staff and the local team determine current level of implementation and identify priority areas for full model implementation.

In ***Kentucky*** sites are assessed at the beginning, mid and end of the year using the Quality Indicators for Students with Moderate and Severe Handicaps (Kleinert, Smith, & Hudson, 1990).

In *California* the overall status of the district's plan for integration or inclusion is assessed using the Integration/Inclusive Local Needs Assessment (Halvorsen, Smithey, Neary, & Gilbert, rev. ed., 1992) which focuses on critical systems wide issues. To determine site and building level status on a number of best educational practice indicators the PEERS project utilizes the Implementation Site Criteria for Integrated Programs (Halvorsen, Smithey, & Neary, 1991).

In *Indiana* district planning reviews take place at the beginning middle and end of the year and focus on systems issues such as the district policies and procedures required to support integration and best practice implementation. In addition, to assess the status of project sites an implementation checklist is used, the results of which provide the basis of the site action plan for technical assistance.

The program review tools just described provide the data related to overall program quality and the basis for action plans, and are used to provide both pre and post data. In order to determine whether or not the desired best practices are installed at the classroom level as well to examine student outcomes, additional program quality measures are implemented.

Furthermore, to examine the overall systems change initiative in comparison to critical activities desired in such efforts, the California Research Institute has designed and utilized Discrepancy Analysis Worksheets (Karasoff, 1991) to determine current status on the implementation of critical systems change activities (see Appendix C).

2. Program Quality Measures

California uses the Schedule Analysis of Integrated Instruction (Halvorsen, Beckstead, & Goetz, 1990) to examine the extent of integrated activities for students across the school day.

In ***Arizona*** the Student Activity Analysis is completed collecting both pre- and post instructional setting data.

In ***Virginia,*** as part of the Implementation Planning and Reveiw Process, the schedules of students with disabilities are examined to determine the type and quantity of interaction during the school week using the Site Report: Contacts with Peers without Disabilities Per Week.

Furthermore, to examine the extent and type of the interactions occurring between the students with disabilities and their nondisabled peers, ***California*** uses an observational tool, the EASI Scale for Social Interaction, (Goetz, Haring, & Anderson, 1989, rev. ed., 1990), and ***Virginia*** uses an adapted version of the EASI twice a year in each implementation site. ***Michigan*** conducts quarterly assessments of interactions via structured observations in their project sites, whereas ***New York*** uses the Assessment of Social Competence (Meyer, Cole, McQuarter, & Reichelle, 1990) to examine social interactions.

To examine the quality of students' Individualized Educational Programs (IEPs) IEP analyses are also conducted to determine whether or not the IEPs reflect the best educational practices. In ***California*** and ***Pennsylvania*** the content and quality of IEP objectives written for students placed in integrated versus segregated placements were examined using the I.E.P. Evaluation Instrument (Hunt, 1986). In ***Indiana*** an IEP study was conducted with model sites to determine the type of activities and skills targeted and the role of parents in choosing their child's IEP goal.

Qualitative Measures

In addition to the observational tools just described, information on the nature of the changes being made in these educational systems is collected by several states by utilizing qualitative techniques. This is accomplished by gathering data designed to capture the points of view of those involved in the change effort. The use of interviews and case studies have been reported by several states.

In ***Virginia*** staff conducted interviews of teachers and administrators to determine their perceptions about the integration of students with moderate and severe disabilities.

California, in conjunction with a CRI study, conducted interviews with implementation site personnel. In addition, CRI conducted interviews with building principals across the country regarding their perspectives on integration and developed a video tape entitled Perspectives from Principals on Full Integration (Kelly, 1989). A parent interview study (Hanline & Halvorsen, 1989) was also conducted by PEERS to examine parent perspectives on the transition from segregated to integrated placements.

In ***New Hampshire*** case studies on integration have been carried out and anecdotal data recorded within sites involved in the change process.

In ***Indiana*** a dissertation study is being conducted with model sites which examine the desegregation of a separate facility. In addition, the staff gather peer tutors "stories" for inclusion in newsletter articles which highlight their experiences.

Assessing Changes in Student Placement

A common goal of all the systems change projects is to significantly increase the numbers of students with severe disabilities who are being educated in integrated environments. As a result, critical quantifiable outcome data are needed to document changes in programs during the course of the systems change project. Therefore, frequency count data, generally in the form of child count data, are collected to document in numbers the students affected by the change process. These data are collected statewide by all states through the child count system at the

State Department of Education level. While this is a mandatory function for all states and provides a great deal of data, the nature of the data varies and, therefore, so does its usefulness. Therefore several projects have either expanded on the data already collected or worked to modify the system to capture more meaningful data. In addition to statewide data, all the projects document the movements made by students from segregated to integrated or inclusive placements at the local level.

In ***Virginia*** placement data are collected annually in project sites and recorded on the School Division Report, Part I: Students Placement. In addition, data are collected in non-participating project sites during years 1, 2 and 4 via a survey to determine actual placements of students with severe disabilities. The survey utilizes the child count data categories as a base and then expands the data requested to include actual physical placement of the classrooms. The project site data and non project site data are then compared.

In ***Indiana*** child count data collected at the state level are analyzed and separate facilities are interviewed to determine placement trends. These data are presented in an annual report at the state LRE conference in the form of the Indiana Report Card. In addition, the project reports and documents this information by writing articles in the Indiana LRE Reporter focusing on the shift in service delivery system.

In ***California*** child count data are collected by the California Department of Education via a student level Management Information System (MIS) designed with input from the PEERS staff and project advisory board to capture pertinent placement data. Additionally, the PEERS implementation sites (districts) collect frequency data to document the number of students moved per year into integrated and inclusive placements.

Evaluation of Training and Technical Assistance

Evaluating the effectiveness of the both the training activities and technical assistance provided by the projects is also a critical evaluation activity and is done by all projects in one form or another. These evaluations are most often completed at the conclusion of an activity to assess the quality and usefulness of the training or technical assistance (TA) provided both in format, content, and delivery.

Participant evaluations of training sessions, workshops, and summer institutes are conducted by all projects and generally are self-administered questionnaires with Likert type rating scales and open ended questions. These evaluation findings are used to modify future training events. In addition, both ***Kentucky*** and ***Colorado*** have conducted six month follow-up questionnaires on specific events to assess the effectiveness of training.

In addition, many projects evaluate the technical assistance (T.A.) they provide to project sites on site. ***Colorado*** evaluates the training and technical assistance provided in project site by the CEEM team and individual team members at the conclusion of each activity via a self administered evaluation form (Evaluation of CEEM training/technical assistance). The evaluation questions posed require a written response from the T.A. recipient and seek to evaluate the usefulness and desired follow-up needed to meet the T.A. need.

In ***Indiana*** an evaluation of the site coordinator is conducted with each model site annually via a written questionnaire (Annual Site Coordinator Review).

In ***Pennsylvania*** the TA recipient in the project site is asked to complete a Consultant Satisfaction Evaluation Form at the conclusion of each T.A. activity. In addition, each project staff is evaluated by the project sites annually via self administered questionnaires.

Virginia requests consumer feedback (Feedback from School Divisions) three times a year from relevant school district personnel in project sites. In addition project staff maintain a contact log recording the type, frequency, and duration of the T.A. provided to all project sites.

In ***California*** during the second year, an evaluation of project services and their impact was conducted via interviews with a randomly selected sample of administrators and teachers. All training and technical assistance services provided by PEERS are evaluated by consumers at minimum at the close of the specific activity.

Impact Evaluation

The examination of relevant policies to determine whether or not the systems have made institutional change is an example of the type of impact evaluations conducted by the systems change projects.

Policy Reviews

Illinois conducts public hearings in conjunction with the State Board of Education to identify the policies that were barriers to the integration process. Once the critical state policy barriers are identified, as was the case with the state funding formula and teacher certification, the Board of Education issues RFP's to study the issues.

In ***California*** the PEERS staff monitor the waivers that are issued by the State education department to LEAs that are requested to facilitate integration and inclusive programming. By tracking these requests the project can determine which state policies require modification.

In ***Michigan*** the project facilitated drafting a Michigan Department of Education position statement on inclusive education (Michigan Department of Education, State Board of Education, February ,1992).

Evaluation Questions and Methods by Critical Activity Area

In this section suggested process, impact, and outcome evaluation questions are presented with suggested evaluation strategies. The section is organized by the five critical activity areas presented in the preceding chapters.

I. Objective: To Conduct Activities to Facilitate Locally Owned Change

Process Evaluation Questions and Methods

1) **Who participated in the change process? Were all key constituencies represented at LEA and building levels?**

Evaluation Method:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Via: Document Review; reports and minutes; Interview Questions; posed to project staff, and local and building level participants.

2) **Are the planning groups continuing to meet once implementation has begun, to monitor, problem-solve and evaluate the change process?**

Evaluation Method:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Via: Document Review; reports and minutes; Interview Questions; posed to project staff, and local and building level participants.

3) **Does the plan have specific objectives, timelines and evaluation criteria for the implementation change?**

Evaluation Method:

Via: Document Review; reports and minutes; Interview Questions; posed to project staff, and local and building level participants.

Outcome Evaluation Questions and Methods

4) How satisfied were participants with the planning process?

Evaluation Method:

Self administered participant satisfaction questionnaires; Interview Questions; posed to relevant participants.

5) How satisfied are consumers of the plans with their implementation? (parents, educators, students and administrators)

Evaluation Method:

Self-administered consumer satisfaction questionnaires; Interview Questions; posed to relevant consumers.

6) Has the training provided to various constituencies throughout the process addressed their needs? Are participants using that information in local implementation?

Evaluation Method:

Participant evaluations of training and technical assistance administered immediately, and follow up questionnaires.

7) How effective is the collaborative teaming process? Do members feel their contributions are valuable and meaningful to the process?

Evaluation Method:

Self administered participant satisfaction questionnaires; Interview Questions; posed to team members.

8) Have the policies and plans developed by the district and school site teams been adopted by their respective governance structures, i.e. Boards of Education and School Site Councils?

Evaluation Method:

Document Review; Board minutes; Interview key participants

Impact Evaluation Questions and Methods

1) **How has integration systems change become infused within the overall school reform? Is there documented evidence of this infusion? Are there plans to facilitate the infusion process if it is not yet in place?**

Evaluation Method:

Interviews with key participants; Document Reviews; e.g., have restructuring or strategic plans been developed.

II. Objective: To Conduct Activities to Increase Awareness and Knowledge of Best Practice

Process Evaluation Questions and Methods

1) **Who were the target audiences for awareness level activities? Was a needs assessment or sampling of awareness level needs conducted for each constituency?**

Evaluation Method:

Discrepancy Analysis; compare membership of audiences attended with planned target audience; Document Review; was an assessment planned and carried out?

2) **Was the effectiveness of awareness level strategies evaluated? Have consumer satisfaction and utility of information data been collected?**

Evaluation Method:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Via Document Review; reports and minutes

3) **How were audiences/participants in skill building activities selected? What types of needs assessment strategies were utilized?**

Evaluation Method:

Interview key participants.

4) Was the effectiveness of skill building strategies evaluated?

Evaluation Method:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Via: Document Review; reports and minutes

5) Have modules, courses, and presentations been adapted to address local needs as assessed in each community?

Evaluation Method:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff, and local and building level participants.

6) Have project staff assisted in the development of school district wide plans for inservice delivery?

Evaluation Method

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff, and local and building level participants.

7) Are there collaborative systems set up among IHEs, project/SEA, and LEAs for research, training and dissemination purposes?

Evaluation Methods:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff university participants.

Outcome Evaluation Questions and Methods

1) **Which strategies were the most effective in delivering awareness level information, e.g. conferences, "road shows", incorporation within existing vehicles, materials dissemination, tours or visits to implementation sites, etc.?**

Evaluation Method:

Evaluate training via self-administered survey

2) **What do the data indicate in terms of consumer satisfaction and skill utility?**

Evaluation Method:

Consumer satisfaction survey

3) **Which strategies were most effective in skill acquisition?**

Evaluation Method:

Comparison of results from different training formats

4) **Does the state's Comprehensive System of Personnel Development (CSPD) reflect systems change priorities?**

Evaluation Method:

Document Review, CSPD Plan; Interview state education personnel

5) **How do the IHEs rate the quality of courses and modules developed/taught by project staff?**

Evaluation Method:

Self administered course evaluation questionnaires; Interviews with faculty

Impact Evaluation Questions and Methods

1) **Have follow-up visits, observations to a sample of participants demonstrated positive outcomes?**

Evaluation Method

Follow-up Interviews and/or questionnaires

III. Objective: Conduct Activities to Support the Implementation Effort

Process Evaluation Questions and Methods

1) **Have policies which affect the provision of services for learners with severe disabilities been reviewed or revised?**

Evaluation Methods:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff, state, local and building level participants.

2) **Have programmatic guidelines been reviewed/revised/new ones developed? Have they been disseminated/field-tested for usefulness?**

Evaluation Methods:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff, state, local and building level participants.

3) **How do visitors evaluate the usefulness of their visit to demonstration sites?**

Evaluation Methods:

Document Review; minutes and reports; Interviews with relevant state and local personnel and project staff; Interviews with sample of visitors; Consumer (visitor) satisfaction surveys.

Outcome Evaluation Questions and Methods

1) **Where needed have new policies been developed? Have efforts been made toward their adoption?**

Evaluation Methods:

Document Review; policies written; minutes and reports, Interviews with relevant state and local personnel and project staff.

2) **Have job roles been reviewed/revised/new ones developed? Have relevant credentials been reviewed/revised/new ones developed for the following: general and special education teachers, related services providers, paraprofessionals, principals, administrators, etc. Are practitioners aware of changes in their job roles and responsibilities? Have they received training about these changes? Are they integrating changes into their performance?**

Evaluation Methods:

Document Review; minutes, relevant reports and state/district documents, Interviews with relevant state and local personnel and project staff.

3) **Have demonstration sites which demonstrate outcomes of systems change initiatives been identified/developed? Has a site agreement/contract been developed and signed? Have plans for growth been developed with these sites? Has a procedure for site visits been established? Are interested persons aware of the opportunity to visits sites? Have sites been utilized for visits/training? How are sites evaluated by staff and visitors?**

Evaluation Method:

Interview Questions; posed to relevant site and project staff.

4) **Have service delivery structures been modified?**

Evaluation Method:

Document Review; district and program descriptions; Interviews with relevant state and local personnel.

Impact Evaluation Questions and Methods

1) **Are practitioners using the programmatic guidelines ? Have they been adopted by the state? Incorporated in to compliance review process?**

Evaluation Methods:

Document Review; minutes and reports; Interview Questions; posed to relevant state and local personnel and project staff.

2) **Is there evidence that visitors to demonstration sites have applied new knowledge gained during the visit in their own settings?**

Evaluation Methods:

Follow-up questionnaires

IV. Objective: To Conduct Activities to Promote Collaboration

Process Evaluation Questions and Methods

1) **Have public policy forums been held/planned? Have key persons/agencies attended?**

Evaluation Method:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff, state, local and building level participants.

2) **Have new courses developed with IHEs been evaluated?**

Evaluation Methods:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff and university participants.

3) **Does the systems change staff participate on joint agency task forces? Have they developed their own advisory board? Do they encourage the development of joint agency task forces within the districts with whom they work? How often do these meet? Are all key persons identified and invited to participate?**

Evaluation Methods:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff and university participants.

4) **Does the systems change staff facilitate the role for advocacy groups within the change process?**

Evaluation Method:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

5) **Has the system change project established an advisory board? Are all relevant agencies and groups identified and asked to send representatives or are representatives selected? Is an advisory board facilitator (Chairperson) selected? Meetings held as scheduled? Purpose established?**

Evaluation Method:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

Outcome Evaluation Questions and Methods

1) **Have new courses been developed with institutions of higher education? Have old/outdated courses been revised? Are new teachers implementing different programs? Have changes been made across preservice training programs? Are these courses also offered to practitioners who are already in service?**

Evaluation Method;

Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

2) **Has the advisory board accomplished what it set out to do?**

Evaluation Method:

Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

3) **Has the systems change project staff facilitated the development of interagency collaboration which leads to the development of interagency agreements?**

Evaluation Methods:

Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

4) **Are advocacy groups identified/included in change efforts/activities? How are they involved?**

Evaluation Methods:

Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

5) **Have decisions been made within the public policy forums? Have these resulted in significant progress in relevant policy revision/development?**

Evaluation Method:

Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

6) **Does the systems change effort involve general educators? If so, how? At the state level, are departments merged/collaborating? Are general educators involved on task forces? Are they attending conferences? Included in trainings and dissemination efforts? Are preservice programs coordinated in terms of content and requirements? At the local level are district departments merged/collaborating? Are district teams heterogeneous? At the building level does the general education principal take ownership for the program/students? Does he/she provide supervision for special education teachers/staff? Are building level teams also heterogeneous? What about individual student planning teams? Are educators collaborating in the schools? Do general education teachers take ownership/provide instruction for the students? Is the general education staff included in all training and dissemination efforts? Do they participate as presenters?**

Evaluation Methods:

Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

Impact Evaluation Questions and Methods

1) **Is special education reform linked to general school restructuring efforts? Document Review; state legislation regarding reform efforts, etc.**

Evaluation Method:

Interview Questions; posed to state and local participants and project staff.

2) **At the university level are departments merged/collaborating?**

Evaluation Method:

Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

V. Objective: Conduct Dissemination Activities

Process Evaluation Questions and Methods

1) **What products have been planned for development, revision, and dissemination? Who are they developed for, i.e. have all key target audiences been identified and included in some way? (Included here are the development and dissemination of newsletters, articles, manuals, and videotapes) Have practitioners utilized/evaluated the products?**

Evaluation Methods:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

2) **Have presentations been planned? Developed? Carried out? Who are they developed for, i.e., have all key target audiences been identified and included in some way? (Included here are conferences, workshops, trainings: maybe at the local site or district level, or regional, state, or national levels). How have participants evaluated the presentations?**

Evaluation Methods:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

3) **Have a variety of approaches to dissemination have been utilized? (Included here are trainer-of trainer models, regionalized approaches, and information fairs and statewide mailings) How have participants evaluated the efforts of training teams?**

Evaluation Methods:

Discrepancy Analysis; compare the current project activities against the originally planned activities in order to identify gaps and deficits. Document Review; reports and minutes; Interview Questions; posed to project staff and state and local participants.

Outcome Evaluation Questions and Methods

1) **Have products developed by the project impacted the implementation of change goals?**

Evaluation Methods:

Follow-up questionnaires; Interview Questions; posed to state and local level participants

2) **Have presentations impacted the implementation of change goals?**

Evaluation Methods:

Follow-up questionnaires; Interview Questions; posed to state and local level participants

3) **Is there evidence that differing dissemination approaches successfully impacted the implementation of change goals?**

Evaluation Methods:

Follow-up questionnaires to recipients; Interview Questions; posed to project staff and state and local participants.

4) Have materials been disseminated to all relevant constituents?

Evaluation Methods:

Document Review; reports.

Selected Systems Change Strategies for Evaluation

Arizona (1990 - 1995)

A Student Activity Analysis is completed collecting both pre and post instructional setting data.

California (1987 - 1992)

Assesses the overall status of the district's plan for integration or inclusion using the Integration/Inclusive Local Needs Assessment (Halvorsen, Smithey, Neary, & Gilbert, rev. ed., 1992) which focuses on critical systems wide issues. To determine site and building level status on a number of best educational practice indicators the PEERS project utilize the Implementation Site Criteria for Integrated Programs (Halvorsen, Smithey, & Neary, rev. ed., 1990).

The Schedule Analysis of Integrated Instruction (Halvorsen, Beckstead, & Goetz, 1990) is used to examine the extent of integrated activities for students across the school day and an observational tool, the EASI Scale for Social Interaction, (Goetz, Haring, and Anderson, 1989, rev. ed., 1990) The content and quality of IEP objectives written for students placed in integrated versus segregated placements were examined using the I.E.P. Evaluation Instrument (Hunt, 1986).

The PEERS staff monitor the waivers that are issued by the State education department to facilitate integration and inclusive programming.

By tracking these requests the project can determine which state code sections require modification.

***Colorado** (1987 -1992)*

The systems change effort focuses on the full installation of components of the Colorado Effective Education Model (CEEM) within each of the project implementation sites. To determine the current status of each site the project uses a standards checklist based on the CEEM model. Project staff and the local team determine current level of implementation and identify priority areas for full model implementation.

Evaluation of the training and technical assistance provided in project site by the CEEM team and individual team members at the conclusion of each activity via a self administered evaluation form (Evaluation of CEEM training/technical assistance). The evaluation questions posed require a written response from the TA recipient and seek to evaluate the usefulness and desired follow-up needed to meet the TA need.

***Illinois** (1987 -1992)*

Conducts public hearings in conjunction with the State Board of Education to identify the policies that were barriers to the integration process. Once the critical state policy barriers were identified, in this case the state funding formula and teacher certification, the Board of Education issued RFPs to study the issues.

***Indiana** (1988 - 1993)*

District planning reviews take place at the beginning middle and end of the year and focus on systems issues such as the district policies and procedures required to support integration and best practice implementation. In addition, to assess the status of project sites an implementation checklist is used, the results of which provide the basis of the site action plan for technical assistance.

A study (dissertation) is being conducted with model sites which examines the desegregation of a separate facility. In addition, the staff gather peer tutors "stories" for inclusion in newsletter articles which highlight their experiences.

Child count data collected at the state level are analyzed and separate facilities are interviewed to determine placement trends. These data are presented in an annual report at the state LRE conference in the form of the Indiana Report Card. In addition, the project reports and documents this information by writing articles in the Indiana LRE Reporter focusing on the shift in service delivery system.

Evaluation of the site coordinator is conducted with each model site annually via a written questionnaire (Annual Site Coordinator Review).

***Kentucky** (1987 - 1992)*

Sites are assessed at the beginning, mid and end of the year using the Quality Indicators for Students with Moderate and Severe Handicaps (Kleinert, Smith, & Hudson, 1990)

***Michigan** (1989 - 1994)*

Conducts quarterly assessments of interactions via structured observations in their project sites. Conducted an external review of project in third year utilizing process, outcomes, and impact evaluation questions across all project objectives. The project facilitated the drafting a Michigan Department of Education position statement on inclusive education.

***New Hampshire** (1988 - 1993)*

Case studies on integration have been carried out and anecdotal data recorded within sites involved in the change process.

New York *(1990 - 1995)*

Project staff uses the Assessment of Social Competence (Meyer, Cole, McQuarter, & Reichle, 1990) to examine social interactions.

Pennsylvania *(1990 -1995)*

The content and quality of IEP objectives written for students placed in integrated versus segregated placements are examined using the I.E.P. Evaluation Instrument (Hunt, 1986). Each T.A. recipient in the project site is asked to complete a Consultant Satisfaction Evaluation Form at the conclusion of each TA activity. In addition, each project staff is evaluated by the project sites annually via self administered questionnaires. Conducts ongoing process evaluation through the use of external consultants utilizing CRI's Discrepancy Analysis Worksheets (Karasoff, 1991).

South Dakota *(1990 -1995)*

The project utilizes an LEA self-study instrument to evaluate district needs and prioritize needed changes.

Utah *(1989 -1984)*

Utilizes program quality indicators to determine the quality of sites and to assist with strategic planning.

Vermont *(1988 - 1993)*

Utilizes The Best Practice Guidelines for Meeting the Needs of All Students in Local Schools (Fox & Williams, 1991) to determine areas in need of improvement. The guide is used by school teams to examine their program against a set of best practices and to then determine the teams level of agreement, level of need for improvement, and priority status of each best practice for their program. The results of this assessment then provide the priority areas for school improvement plans.

***Virginia** (1987 - 1992)*

Examines school improvement by conducting a review of each implementation site across four critical systems planning areas and seven best practice components utilizing the Administrative Planning and Review Checklist, and the Implementation Site Planning and Review Checklist, respectively. Both pre and post data are collected and are then summarized across all sites annually. ***Virginia*** uses an adapted version of the EASI (Goetz, Haring, & Anderson, 1983) twice a year in each implementation site.

Staff conducted interviews of teachers and administrators are completed to determine their perceptions about the integration of students with moderate and severe disabilities.

Placement data are collected annually in project sites and recorded on the School Division Report, Part I: Students Placement. In addition, data are collected in non-participating project sites during years 1, 2 and 4 via a survey to determine actual placements of students with severe disabilities. The survey utilizes the child count data categories as a base and then expands the data requested to include actual physical placement of the classrooms. The project site data and non project site data are then compared.

Requests consumer feedback (Feedback from School Divisions) three times a year from relevant school district personnel in project sites. I n addition, project staff maintain a contact log recording the type, frequency, and duration of the T.A. provided to all project sites.

***Washington** (1988 - 1993)*

Project staff collect data using quality indicators of integrated education and programs and a self-assessment instrument. These set firm guidelines concerning current best educational practices for individuals with severe disaabilities. They serve as a back drop against which districts evaluate their own efforts to provide quality programs. The instrument allows districts to evaluate their own strengths and needs in regard to identified best practice.

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APPENDIX A

Statewide Systems Change Project Directory

Statewide Systems Change Project Directory[*]

Arizona (1990–1995)

Arizona Statewide Systems Change Project

Coordinated by the ADE. Project purpose is to provide school districts with training and technical assistance which will assist them to educate the majority of students with severe disabilities on age-appropriate regular school campuses.

Judith Croswell, Project Director
Arizona Department of Education
1535 W. Jefferson
Phoenix, AZ 85007
(602) 542-3184

Bobbie Stephenson, Central Arizona Consultant
Arizona Department of Education
1535 W. Jefferson
Phoenix, AZ 85007
(602) 542-4831

Maria Berecin, Southern Arizona Consultant
Arizona Department of Education
400 W. Congress, Suite 241
Tucson, AZ 85701
(602) 628-6337

Betty Walch, Northern Arizona Consultant
132 S. Montezuma
Prescott, AZ 86303
(602) 778-6717

California (1987–1992)

PEERS Project: Providing Education for Everyone in Regular Schools

Collaborative effort between CDE, IHEs, Special Education Local Plan Areas (SELPAs), and LEAs. Overall goal is to develop integrated and inclusive options for previously segregated students with severe disabilities.

Ann Halvorsen, Integration Training Coordinator
Dept. of Education Psychology
CSU, Hayward
Hayward, CA 94542
(510) 881-3087; (415) 338-7849

Patrick Campbell, Project Director
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 323-4768

Tom Neary, North-Central Coordinator
PEERS Project
650 Howe Avenue, Suite 300
Sacramento, CA 95825
(916) 641-5930

Suzanne Gilbert, Southern Region Coordinator
PEERS Project
650 Howe Avenue, Suite 300
Sacramento, CA 95825
(916) 641-5930

Susan Terry-Gage, Southern Region Co-Coordinator
PEERS Project
650 Howe Avenue, Suite 300
Sacramento, CA 95825
(916) 641-5930

Steve Johnson, Administrator, Statewide Services
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 323-4871

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[*] For further information on any one of the Project's listed, please direct inquiries to the personnel listed in bold.

Colorado (1987–1992)

Colorado Effective Education Model (Skills for Life) for Students with Severe/ Profound Needs

Collaborative effort, coordinated and implemented by CDE and local public schools. Project purpose: Systems change through partnerships. CEEM was developed based on the premise that significant change in educational programs can best be achieved through the combination of state level support and local school implementation. Each participating site will implement best practice outcomes that reflect model component areas.

Terri Rogers-Connolly, Project Director
Special Education Services
Colorado Department of Education
201 E. Colfax Avenue
Denver, CO 80203
(303) 866-6702

Robi Kronberg, Project Coordinator
Special Education Services
Colorado Department of Education
201 E. Colfax Avenue
Denver, CO 80203
(303) 866-6706

Michael Delaney, Site Coordinator
Special Education Services
Colorado Department of Education
201 E. Colfax Avenue
Denver, CO 80203
(303) 866-6703

Janet Filbin, Site Coordinator
Special Education Services
Colorado Department of Education
201 E. Colfax Avenue
Denver, CO 80203
(303) 866-6705

Billie Jo Clausen, Site Coordinator
Rocky Mountain Resource & Training Institute
6355 Ward Road, Suite 310
Arvada, CO 80004
(303) 420-2942

Hawaii (1988–1993)

Hawaii Statewide Systems Change Project

A cooperative effort between the Hawaii UAP, University of Hawaii and the State Department of Education. "Its primary mission is the development, in conjunction with the Part B State Plan, of activities to improve the quality of educational and related services for students with severe disabilities. This includes, but is not limited to, moving these services to age-appropriate neighborhood schools and supporting these efforts to include students with severe disabilities in general education classes."

Jim Artesani, Project Coordinator
Hawaii Statewide Systems Change Project
University of Hawaii at Manoa
1776 University Ave., UA4-4
Honolulu, HI 96822
(808) 956-4456

Tiina Itkonen, Inservice Coordinator
Hawaii Statewide Systems Change Project
University of Hawaii at Manoa
1776 University Ave., UA4-4
Honolulu, HI 96822
(808) 956-4456

Corey Knox, Graduate Assistant
Hawaii Statewide Systems Change Project
University of Hawaii at Manoa
1776 University Ave., UA4-4
Honolulu, HI 96822
(808) 956-4456

Dale Frixell, Graduate Assistant
Hawaii Statewide Systems Change Project
University of Hawaii at Manoa
1776 University Ave., UA4-4
Honolulu, HI 96822
(808) 956-4456

Illinois (1987–1992)

Project CHOICES: Children Have Opportunities in Community Environments

Combined efforts of Northern Illinois University (NIU), Illinois State Board of Education (ISBE), and SASED (The School Association for Special Education, DuPage County). The mission of the Illinois Statewide Systems Change Cooperative Agreement is to build the capacity of individual school districts to be able to serve children, youth and young adults with severe disabilities, ages birth through 21, in the community and education settings in which they would participate if they were not disabled. Strategies to accomplish the mission include, (a) technical assistance to local school districts, (b) the development of state agency policies to support inclusion in schools and local communities, (c) statewide campaigns of awareness and education, and (d) parent education and assistance.

Sharon Freagon, Project Director
Northern Illinois University, EPCSE
Graham Hall, Room 242
DeKalb, IL 60115
(815) 753-0656

Maureen Kincaid, Assistant to the Director
Northern Illinois University, EPCSE
Graham Hall, Room 242
DeKalb, IL 60115
(815) 753-0993

Bill Peters, Advisor & Trainer, Regular & Special Education Administrators
4418 Maple
Cortland, IL 60112
(815) 758-0651

Nancy Keiser, Assistant to the Director
Northern Illinois University, EPCSE
Graham Hall, Room 242
DeKalb, IL 60115
(815) 753-0994

Lynda Atherton, Parent Coordinator
Northern Illinois University, EPCSE
Graham Hall, Room 242
DeKalb, IL 60115
(815) 753-0992

Indiana (1988–1993)

I-LRE-I: The Indiana Least Restrictive Environment Initiative

Awarded to IDE, Division of Special Education Services, Institute for the Study of Developmental Disabilities (UAP), & Community Integration Resource Group at Indiana University. The focus of the I-LRE-I is to promote quality integrated educational programs statewide for students who have severe handicaps. Project coordinates the efforts of the State education agency, five major university campuses, and local school districts to improve educational services for students who have severe handicaps.

Barbara Wilcox, Project Director
Institute for the Study of Dev. Disabilities
Indiana University, 2853 East Tenth Street
Bloomington, IN 47405
(812) 855-6508

Paul Ash
Department of Education, Division of Special Education, State House, Room 229
Indianapolis, IN 46204-2798
(317) 232-0570

Cathy Pratt, Project Coordinator
Institute for the Study of Dev. Disabilities
Indiana University, 2853 East Tenth Street
Bloomington, IN 47405
(812) 855-6508

Jeffrey Sprague
Institute for the Study of Dev. Disabilities
Indiana University, 2853 East Tenth Street
Bloomington, IN 47405
(812) 855-6508

Kentucky (1987–1992)

Kentucky Systems Change Project

KDE & the Interdisciplinary Human Development Institute at the University of Kentucky. Project purpose is to provide systems change to the local levels: move students from segregated to age-appropriate regular school campuses; increase the quality and frequency of interactions with nonhandicapped peers; implement functional community-referenced programs; and at the state level formulate policy/ position papers.

Harold Kleinert, Project Director
IHDI
114 Mineral Industries Building
University of Kentucky
Lexington, KY 40506-0051
(606) 257-3045

Preston Lewis, Principal Investigator
Kentucky Department of Education
500 Mero Street
Capitol Plaza Tower
Frankfort, KY 40601
(502) 564-4970

Jacqui Farmer, Associate Director
IHDI
114 Mineral Industries Building
University of Kentucky
Lexington, KY 40506-0051
(606) 257-3045

Amy Reber, Associate Director
Ft. Wright School
501 Farrell Drive
Covington, KY 41011

Michigan (1989–1994)

Michigan Inclusive Education Project

A cooperative project between MDE (SES) and the Developmental Disabilities Institute at Wayne State University. Project purpose is to provide intense statewide training and technical assistance to schools, policy analysis and development, leadership development, and related activities to facilitate integration of students with disabilities into regular education classes in regular schools as part of a statewide effort to make schools more effective for all youth in Michigan.

Barbara LeRoy, Project Coordinator
DDI/Wayne State University
6001 Cass Avenue, Suite 325
Detroit, MI 48202
(313) 577-7981

Joseph Gomez, Project Manager
Michigan Department of Education
P.O. Box 30008
Lansing, MI 48909
(517) 373-1696

Jill England, Inclusion Specialist
DDI/Wayne State University
6001 Cass Avenue, Suite 325
Detroit, MI 48202
(313) 577-7981

Tom Osbeck, Inclusion Specialist
DDI/Wayne State University
6001 Cass Avenue, Suite 325
Detroit, MI 48202
(313) 577-7981

New Hampshire (1988–1993)

New Hampshire Statewide Systems Change Project

Collaborative effort between the New Hampshire Special Education Bureau and the Institute on Disability/UAP at the University of New Hampshire. Project goals are to increase the capacity of districts to include children with severe disabilities in home schools, and to provide state-level systems change initiatives.

Jan Nisbet, Executive Director
Institute of Disability/UAP
Morril Hall
University of New Hampshire
Durham, NH 03824
(603) 862-4320

Robert Kennedy, Director
New Hampshire Special Education Bureau
New Hampshire Dept. of Education
101 Pleasant Street
Concord, NH 03301
(603) 271-3741

Cheryl Jorgensen, Project Co-Coordinator
Center for Health Promotion
Hewett Hall
University of New Hampshire
Durham, NH 03824
(603) 862-4042

Carol Tashie, Project Co-Coordinator
Office for Training & Educational Innovations
The Concord Center, Suite 309A
10 Ferry Street, #14
Concord, NH 03301
(603) 228-2084

Carolyn Rudy, Educational Consultant
Center for Health Promotion
Hewett Hall
University of New Hampshire
Durham, NH 03824
(603) 862-4042

Susan Shapiro, Educational Consultant
Office for Training & Educational Innovations
The Concord Center, Suite 309A
10 Ferry Street, #14
Concord, NH 03301
(603) 228-2084

New York (1990–1995)

The New York Partnership for Statewide Systems Change

Collaborative effort between NYSDE (SES) & Syracuse University's School of Education. The primary goal of the project is to develop implement and evaluate a systems change process to help districts develop quality inclusive opportunities for students with severe disabilities in their home schools and classrooms.

Lawrence Waite, Director, Division of Program
Development & Project Manager
New York State Education Dept.
Office for Education of Children with
Handicapping Conditions
Education Building Annex, EBA Room #1073
Albany, NY 12234
(518) 474-8917

Thomas Neveldine, Assistant Commissioner,
Principal Investigator & Project Co-Director
New York State Education Dept.
Office for Education of Children with Handicapping
Conditions
Education Building Annex, EBA Room #1073
Albany, NY 12234
(518) 474-8917

Luanna Meyer, Project Co-Director
Professor of Education
School of Education
Syracuse University
805 South Crouse Avenue
Syracuse, NY 13244-2280
(315) 443-9651

James Black, Project Coordinator
Special Education Department
805 South Crouse
Syracuse University
Syracuse, NY 12344
(315) 443-9651

Matt Giugno, Project Associate
New York State Education Dept.
Office for Education of Children with
Handicapping Conditions
Education Building Annex, EBA Room #1073
Albany, NY 12234
(518) 474-8917

Pennsylvania (1990–1995)

GATEWAYS: Pennsylvania's Best Practice and Integration Initiative for Students with Severe Disabilities

The focus of the project is on the use of technical assistance, training, and collaboration to impact upon all of the "systems" which affect the delivery of educational services to students with severe disabilities.

Jeannine Brinkley, Director of Technical Assistance & Project Coordinator
Western Instructional Support Center
5347 William Flynn Highway
Gibsonia, PA 15044
(800) 446-5607, x213

Beverly Cush Evans, Western PA Coordinator
Western Instructional Support Center
5347 William Flynn Highway
Gibsonia, PA 15044
(800) 446-5607, x233

Deborah Hagy, Midstate PA Coordinator
MISC, 150 S. Progress Avenue
Harrisburg, PA 17109
(800) 222-7372

Linda O'Connor Rhen, Project Director
Pennsylvania Department of Education
333 Market Street
Harrisburg, PA 17126
(717) 783-6913

Melody Nay Schaff, Eastern PA Coordinator
Eastern Instructional Support Center
200 Anderson Road
King of Prussia, PA 19406
(800) 441-3215

Dick DeVett, Regional Consultant
Central Susquehanna Intermediate Unite
P.O. Box 213
Lewisburg, PA 17837-0213
(717) 523-1155

South Dakota (1990–1995)

South Dakota Statewide Systems Change Project

Project purpose is to provide processes to assure that children with severe handicaps remain in their neighborhood and community school programs and establish resources to assist parents in successfully supporting their children at home.

Dean Myers, Project Director
Office of Special Education
700 Governors Drive
Pierre, SD 57501
(605) 773-3678

Patty Bordeaux-Nelson, Education Strategist
P.O. Box 425
Madison, SD 57042
(605) 256-4327

Phyllis Graney, Model Systems Planner
121 West Dakota
Pierre, SD 57501
(605) 224-9554

Linda Brousard-Norcross, Inservice/Preservice Planner
601 W. 4th Street
Sioux Falls, SD 57104
(605) 338-2451

Paula Platz, Education Strategist
P.O. Box 284
Mitchell, SD 57301
(605) 996-1164

Lori Laughlin, Education/Parent Strategist
1140 North Main, P.O. Box 12
Spearfish, SD 57783
(605) 642-8721

Utah (1989–1994)

Utah Project for Integration

Administered by the Special Education section of the Utah State Office of Education. The project purpose is to provide the technical assistance and support to school district administrators, faculty, support personnel, and parents to implement integrated and community-referenced educational programs for students with severe handicaps from early childhood through secondary/transition programs.

Janet Freston, Project Director
Utah State Office of Education
250 East 500 South
Salt Lake City, UT 84111
(801) 538-7716

Loydene Hubbard-Berg, Program Specialist
Utah State Office of Education
350 East 500 South, Suite 202
Salt Lake City, UT 84111
(801) 533-6264

Tim McConnell, Program Specialist
Utah State Office of Education
350 East 500 South, Suite 202
Salt Lake City, UT 84111
(801) 533-6264

Vermont (1988–1993)

Statewide Systems Support for Local Intensive Educational Services in Vermont

Jointly administered by the Vermont Department of Education, Special Education Unit, and the Center for Developmental Disabilities at the University of Vermont. The goal of the project is to improve educational services for students with intensive needs, including those with dual sensory impairments, in their local neighborhood schools.

Wayne Fox, Project Director
Center for Developmental Disabilities
University of Vermont
499 C Waterman Building
Burlington, VT 05405
(802) 656-4031

Marc Hull, Co-Director
Vermont Department of Education
Special Education Unit
120 State Street
Montpelier, VT 05602
(802) 828-3141

Tim Fox, Project Coordinator
Center for Developmental Disabilities
University of Vermont
499 C Waterman Building
Burlington, VT 05405
(802) 656-4031

Laurie Gossens, Co-Coordinator
Vermont Department of Education
Special Education Unit
120 State Street
Montpelier, VT 05602
(802) 828-3141

Virginia (1990–1995)

Virginia Statewide Systems Change Project

VDE, George Mason University, the University of Virginia, and Virginia Commonwealth University. The main goals of the project include significantly increasing the number of students with severe disabilities who are educated alongside their nondisabled peers in general education schools and classrooms, and improving the quality of educational programs for students with severe disabilities.

David Aldrich, Project Director
Virginia Department of Education
Division of Special Education, P.O. Box 6-Q
Richmond, VA 23216
(804) 225-2883

Rachel Janney, Associate Project Director
Virginia Commonwealth University
P.O. Box 2020, 1015 W. Main Street
Richmond, VA 23284-2020
(804) 367-8802

Fred Orelove, Southeast Regional Director
Virginia Institute for Developmental Disabilities
Virginia Commonwealth University
P.O. Box 3020
Richmond, VA 23284-3020
(804) 255-3908

Jamie Ruppman, Northern Regional Coordinator
George Mason University
4400 University Drive
Fairfax, VA 22030
(703) 323-3787

Mary Beers, Southeast Regional Coordinator
Virginia Commonwealth University
P.O. Box 2020, 1015 W. Main Street
Richmond, VA 23284-2020
(804) 367-8802

Julie Jones, Northern Regional Director
George Mason University
4400 University Drive
Fairfax, VA 22030
(703) 323-3787

Maria Raynes, Southwest Regional Coordinator
University of Virginia
Peyton House, 164 Rugby Road
Charlottesville, VA 22903
(804) 924-3788

Martha E. Snell, Southwest Regional Director
University of Virginia
405 Emmet Street
Ruffner Hall, Room 236
Charlottesville, VA 22903
(804) 924-7461

Washington (1989–1994)

Washington Systems Change Project: Community Model for Integration
Combined efforts of Office of Superintendent of Public Instruction, Department of Social and Health (DSHS), two state universities, all school districts in the state, professional associations, and parent groups. The overall goal of the project is to improve the quality and integration of educational programming for all students (birth-21) with severe disabilities in the state of Washington.

Gregg Anderson, Co-Director
Div. of Developmental Disabilities
Dept. of Social & Health Services
1946 S. State Street, Mailstop N27-6
Tacoma, WA 98405-2850
(206) 593-2812

Ed Helmstetter, Co-Director
Washington State University
Dept. of Educational & Counseling Psychology
Pullman, WA 99164-2131
(509) 335-7016

Norris Haring, Co-Director
University of Washington, Miller Hall
MS: DQ-05
Seattle, WA 98195
(206) 543-8565

Connie Woods, Project Coordinator
Office of the Superintendent of Public
Instruction
Old Capitol Building, FG-11
Olympia, WA 98504
(206) 753-6733

John Stern, Co-Director
Div. of Developmental Disabilities
Dept. of Social & Health Services
1946 S. State Street, Mailstop N27-6
Tacoma, WA 98405-2850
(206) 593-2812

Lyle Romer, Co-Director
University of Washington, Miller Hall
MS: DQ-05
Seattle, WA 98195
(206) 543-8565

Jane Rosenberg, Co-Director
Washington State University
Dept. of Educational & Counseling Psychology
Pullman, WA 99164-2131
(509) 335-7016

Carole Stowitschek, Project Assistant
Office of the Superintendent of Public
Instruction
Old Capitol Building, FG-11
Olympia, WA 98504
(206) 753-6733

APPENDIX B

Statewide Systems Change Project Products

Statewide Systems Change Project Products

Arizona (1990-1995)

Arizona Statewide Systems Change Project (1992). Transition planning and technical assistance needs survey. Phoenix, AZ: Arizona State Department of Education.

Arizona Statewide Systems Change Project (1992). Best practice manual. Phoenix, AZ: Arizona State Department of Education.

Arizona Statewide Systems Change Project (1992). Student activity analysis. Phoenix, AZ: Arizona State Department of Education.

California (1987-1992)

California State Department of Education (1992). California implementation sites: Guidelines for maintaining, supporting, and utilizing implementation sites. Sacramento, CA: California State Department of Education, TRCCI, PEERS, CDBS, & PBC Projects.

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Smithey, L. (1990). Education of exceptional individuals (course syllabus for mainstreaming course for regular education teachers). Long Beach, CA: California State University, Long Beach, PEERS Project.

Smithey, L., Neary, T., & Halvorsen, A.T. (1988, 1991). SELPA and district application process. Sacramento, CA: California State Department of Education, PEERS Project.

Colorado (1987-1992)

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Hawaii (1989-1994)

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Kishi, G., & Lopes, R. (1990). Functional curricular development for students with severe disabilities. Honolulu, HI: University Affiliated Program, University of Hawaii.

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Illinois (1987-1992)

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Kentucky (1987-1992)

Kleinert, H., & Hudson, M. (1991). Model local catalogs and curriculum process for students with moderate and severe handicaps (manual and software program). Lexington, KY: University of Kentucky.

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Michigan (1989-1994)

LeRoy, B. (1991). Inclusive school communities: Community building in the classroom (manual). Detroit, MI: Wayne State University, Michigan Inclusive Education Project.

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LeRoy, B., & England, J. (1991). Inclusive school communities: Instructional process (manual). Detroit, MI: Wayne State University, Michigan Inclusive Education Project.

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Osbeck, T. (1991). Inclusive education: Benefits for all students (research report). Detroit, MI: Wayne State University, Michigan Inclusive Education Project.

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New Hampshire (1988-1993)

New Hampshire's Statewide Systems Change Project (no date). Innovations: Statewide systems change project (newsletter). Durham, NH: University of New Hampshire.

New Hampshire's Statewide Systems Change Project (no date). Integrating AAC instruction into regular education settings: Expounding on best practices. Durham, NH: University of New Hampshire.

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New Hampshire's Statewide Systems Change Project (no date). What do people need to know and believe to include students with severe disabilities in regular classes. Durham, NH: University of New Hampshire.

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New York (1990-1995)

Erevelles, N., Black, J., & Meyer, L.H. (1992). Attitudes toward the inclusion of students with severe disabilities: A survey. Syracuse, NY: New York State Partnership for Statewide Systems Change Project.

Meyer, L.H. (1992). Integrated therapy training module. Syracuse, NY: New York State Partnership for Statewide Systems Change Project.

Pennsylvania (1990-1995)

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Works in progress:

Pennsylvania State Department of Education (1993). GATEWAYS video. Harrisburg, PA: Author.

South Dakota (1990-1995)

South Dakota State Systems Change Project (1993). Integration primer. Pierre, SD: South Dakota State Department of Education.

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South Dakota State Systems Change Project (1993). Best practice action packages (available, June 1993). Pierre, SD: South Dakota State Department of Education.

Virginia (1987-1992)

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Virginia Statewide Systems Change Project (no date). Moving from segregated to integrated special education: A systems change process for local education agencies. Richmond, VA: Virginia Commonwealth University.

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Utah (1989-1994)

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Vermont (1987-1992)

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Williams, W., Fox, T., Monley, M.K., McDermott, A., & Fox, W. (1989). Guidelines and procedures training manual – Manual III of the individual program design series. Burlington, VT: University of Vermont.

Williams, W., Fox, T., Monley, M.K., McDermott, A., & Fox, W. (1989). Student record – Manual 1 of the individual program design series. Burlington, VT: University of Vermont.

Washington (1988-1993)

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Washington State Systems Change Project (1992). Self-assessment instrument. Olympia, WA: Washington State Department of Public Instruction.

APPENDIX C

Systems Change Discrepancy Analysis Worksheets

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: ACTIVITIES TO FACILITATE LOCALLY-OWNED CHANGE

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
a) Identify and involve key stakeholders in the change process from the beginning	Yes / No		
b) Form a broad based integration task force	Yes / No		
c) Define terms and clarify the vision for change	Yes / No		
d) Facilitate a local integration needs assessment process; provide the tool and guide its completion	Yes / No		
e) Facilitate a review of the results – Guide the consensus building process	Yes / No		

Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets. California Research Institute, San Francisco State University.

(CONTINUED)

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: ACTIVITIES TO FACILITATE LOCALLY-OWNED CHANGE

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
f) Facilitate the development of a local implementation plan based on the results of the needs assessment	Yes / No		
g) Develop or utilize the existing district mission statement to anchor the goals	Yes / No		
h) Interface activities within the context of the existing school planning process	Yes / No		
i) Provide ample opportunities for professional growth and district recognition	Yes / No		

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Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets.
California Research Institute, San Francisco State University.

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: ACTIVITIES TO INCREASE AWARENESS AND KNOWLEDGE OF BEST PRACTICE

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
AWARNESS			
a) Promote conference attendance	Yes / No		
b) Provide awareness training within existing district staff development courses and school specific inservice training sessions	Yes / No		
c) Present information in a variety of formats to a wide array of stakeholders	Yes / No		
d) Provide opportunities for teachers, parents, administrators, and other relevant stakeholders to visit "exemplary" sites: Seeing is Believing!	Yes / No		
e) Provide leadership training	Yes / No		

Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets.
California Research Institute, San Francisco State University.

(CONTINUED)

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: ACTIVITIES TO INCREASE AWARENESS AND KNOWLEDGE OF BEST PRACTICE

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
SKILL BUILDING f) Conduct summer institutes	Yes / No		
g) Coordinate with teacher training institutes: Develop and teach courses	Yes / No		
h) Develop content specific "training modules"	Yes / No		
i) Provide regionalized "Best Practice Forums"	Yes / No		

Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets.
California Research Institute, San Francisco State University.

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: ACTIVITIES TO SUPPORT IMPLEMENTATION EFFORT

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
a) Modify or develop new policies to support change	Yes / No		
b) Develop programmatic guidelines	Yes / No		
c) Modify job roles and descriptions	Yes / No		
d) Develop regional demonstration/ implementation sites	Yes / No		
e) Modify service delivery structure and resource allocations	Yes / No		

Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets.
California Research Institute, San Francisco State University.

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: ACTIVITIES TO INCREASE CAPACITY AND BUILD NETWORKS

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
a) Facilitate site networking meetings across the state	Yes / No		
b) Develop building-based support teams	Yes / No		
c) Create district wide "cadres" of expertise	Yes / No		
d) Promote visitations within and across district for new ideas	Yes / No		
e) Share resources, videotapes, newsletters, books, etc.	Yes / No		

Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets.
California Research Institute, San Francisco State University.

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: ACTIVITIES TO PROMOTE COLLABORATION

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
a) Create public policy forums inviting relevant agency personnel to review joint policy directions	Yes / No		
b) Develop courses with Institutes of Higher Education	Yes / No		
c) Participate on joint agency task forces	Yes / No		
d) Develop interagency agreements as appropriate	Yes / No		
e) Facilitate roles for advocacy groups within the change process	Yes / No		

Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets. California Research Institute, San Francisco State University.

(CONTINUED)

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: ACTIVITIES TO PROMOTE COLLABORATION

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
f) Establish a statewide Advisory Board	Yes / No		
g) Involve Regular Educators	Yes / No		

Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets. California Research Institute, San Francisco State University.

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: DISSEMINATION ACTIVITIES

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
a) Present at local, state, and national conferences – Develop co-presentations with local sites	Yes / No		
b) Develop newsletters, articles, manuals, videotapes, etc.	Yes / No		
c) Conduct statewide and districtwide mailings	Yes / No		
d) Utilize "trainer of trainers" approach to disseminate widely	Yes / No		
e) Utilize regionalized approach for delivery of inservice training	Yes / No		

Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets.
California Research Institute, San Francisco State University.

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: DISSEMINATION ACTIVITIES

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
f) Utilize existing district "information" fairs to disseminate best practice information	Yes / No		

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Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets.
California Research Institute, San Francisco State University.

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: ACTIVITIES TO EVALUATE THE CHANGE PROCESS

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
a) Conduct analysis of state and local policies changes, state compliance review process and findings, and number of state agency waiver requests	Yes / No		
b) Collect count data on the number of students moved into age-appropriate integrated environments per year	Yes / No		
c) Conduct longitudinal analyses of statewide child count data	Yes / No		
d) Conduct external evaluation of systems change process	Yes / No		
e) Collect qualitative data	Yes / No		

Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets.
California Research Institute, San Francisco State University.

(CONTINUED)

CALIFORNIA RESEARCH INSTITUTE
DISCREPANCY ANALYSIS WORKSHEET

FOCUS: ACTIVITIES TO EVALUATE THE CHANGE PROCESS

SYSTEMS CHANGE ACTIVITY	STATUS: Is this type of activity taking place?	IF YES, DESCRIBE ACTIVITY	IF NO, DESCRIBE ACTIONS NECESSARY TO ESTABLISH THIS TYPE OF ACTIVITY
f) Analyze best practice checklist data	Yes / No		
g) Conduct Schedule Analysis	Yes / No		
h) Conduct Social Interaction Assessments	Yes / No		
i) Conduct Pre - Post I.E.P Reviews	Yes / No		
j) Conduct participant evaluations of training events			

Karasoff, P. (1991). Systems Change: Discrepancy Analysis Worksheets.
California Research Institute, San Francisco State University.

Appendix H

Curriculum Adaptation Manual

CURRICULUM ADAPTATION FOR INCLUSIVE CLASSROOMS

Tom Neary

PEERS Project
California State University, Sacramento

Ann Halvorsen

PEERS Project
California State University, Hayward

Robi Kronberg

Colorado Systems Change Project
Colorado State Department of Education

Dotty Kelly

California Research Institute
San Francisco State University

DECEMBER, 1992

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CURRICULUM ADAPTATION FOR INCLUSIVE CLASSROOMS

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I. INTRODUCTION

By: Dotty Kelly

Overview of Manual Development

The California Research Institute (CRI) at San Francisco State University is a five year (1987-1992) federally-funded cooperative agreement to conduct research related to integration and to support integration of students with severe disabilities through technical assistance to the first five systems change project states. CRI conducted annual needs assessments with these federally funded systems change states (Kentucky, California, Colorado, Illinois, and Virginia) to determine the resources needed to support their integration efforts. In 1987-88 one technical assistance objective identified by states was "to provide assistance on full inclusion focusing on both curricular and instructional strategies." As a result of this technical assistance, over 200 experts on full inclusion throughout the country were identified and asked to recommend schools/districts that should be included on a nationwide list. A national network of sixty-seven full inclusion sites was developed from these sources. Schools/districts that were recommended were asked to complete a Full Inclusion Site Implementation Checklist (Halvorsen, Smithey, & Neary, 1991) to determine whether they met the CRI definition of inclusion. In addition, two surveys on inclusion strategies and curricular adaptation approaches were completed by full inclusion sites from twelve states (California, Colorado, Indiana, Illinois, Kansas, Kentucky, Maine, Montana, New Hampshire, Oregon, South Dakota, and Vermont). These sites included the range of K-12 programs in rural, suburban, and urban areas from a cross-section of the country. Most sites had a diverse cultural and ethnic mix of students. The information provided by these sites formed the initial bases for this manual, Curriculum Adaptations for Inclusive Classrooms.

The manual has been a collaborative effort between CRI and the Systems Change Projects in California (PEERS) and Colorado. The information we have included in this manual reflects the information shared with us from practicing full inclusion sites. Our goal is to make this information accessible to parents, teachers, special support personnel and administrators in order to support programs that are developing inclusive schools in their communities and states.

The manual is divided into six sections including appendices. These sections include content on: (1) service delivery models; (2) building-level support and strategies; (3) classroom-based strategies; and (4) student-specific strategies to support inclusive education. Please see the Table of Contents for specific page references.

In order to discuss inclusive programs, it is best to begin with defining what is meant by the use of the term *inclusion* in this manual. When referring to inclusion, we are using the definition of full inclusion that was developed by CRI (Sailor, 1991):

1) All students attend the school to which they would go if they had no disability;
2) A natural proportion (i.e., representative of the school district at large) of students with disabilities occurs at any school site;
3) A zero-rejection philosophy exists so that typically no student would be excluded on the basis of type or extent of disability [except, see Sailor, Gerry, & Wilson (1991) for a discussion of the implications of these models for children with deafness];
4) School and general education placements are age- and grade-appropriate, with no self-contained special classes operative at the school site;
5) Cooperative learning and peer instructional methods receive significant use in general instructional practice at the school site; and

6) Special education supports are provided within the context of the general education class and in other integrated environments.

Historical Perspective

The concept and practice of integration has changed and grown over the years. In late 1987 when CRI was funded, research data from over 200 programs throughout the country indicated strong support for the practice of placing students with severe disabilities in regular schools in order to involve/integrate them with nondisabled students at non-academic periods such as recess, lunch and perhaps art, physical education and fieldtrips. Academic integration was uncommon, and a major emphasis was placed on community intensive instruction. At this juncture, the concept of inclusion versus integration was just being introduced and was still controversial. However, given the logic of integrating *natural proportions* of students with severe disabilities (1-2% of the population they represent), it became more clear to practitioners that the best way to accomplish *natural proportion* was for students to attend their home schools, the schools they would usually attend if they had no disability. This movement to home schools broke the paradigm of the homogenous grouping of students with severe disabilities. Pragmatically, it was no longer feasible to fund special classes, at least in small schools, to support two to three students with diverse needs. The vision of enlightened school administrators, teachers and parents, coupled with this paradigm shift resulted in schools implementing full inclusion programs with great success... success for all students! Today, full inclusion programs for students with severe disabilities are being developed and implemented in every state in the country. There is a growing support for inclusive education for all students with disabilities, and recognition that special education is not a place, but rather individualized services to support students. Inclusive programs were supported as best practice first by The Association for Persons with Severe Handicaps (TASH), and there is growing endorsement across the field of general and special education. The National Association of State Boards of Education (NASBE) recently issued a report prepared by their special education study group entitled, "Winners ALL: A Call for Inclusive Schools." The Association of Supervision and Curriculum Development (ASCD) has also issued a recent statement in support of inclusive education. The National Association of State Directors of Special Education (NASDSE) dedicated a major portion of its 1992 annual conference to inclusion.

The rationale for inclusive education is strong. Reports from practitioners have indicated that all students in the school benefit socially and emotionally. Academic scores do not suffer and some at-risk students improve in areas of self esteem and attendance. Students with severe disabilities make friends with school peers that carry over into home-neighborhood environments; they learn more basic and academic skills, and they break down attitudinal barriers that have been based on the stigma of negative stereotypes. Students, teachers and parents learn that kids with disabilities are people first... competent individuals who can be good friends and contributing members of their community.

Parent advocacy and the legal rights provided by P.L. 94-142, now entitled The Individuals with Disabilities Education Act (IDEA), and many court cases supporting access to a free appropriate public education in the least restrictive environment have sent a clear message to schools. The recent California case of Rachel Holland vs. Sacramento City Schools and many other cases around the nation have brought the issue of inclusion to the forefront. Repeatedly, courts have upheld the rights of individuals with disabilities to be fully included in regular classrooms.

Research conducted by CRI and numerous other investigators throughout the country has demonstrated positive outcomes of inclusion. CRI's fifth year of research was dedicated to investigating a number of critical inclusion questions. A number of statistically significant ($p < .05$, two-tailed) outcomes across a variety of instruments are provocative. Data from the IEP instrument (Hunt, Goetz, & Anderson, 1986), which measures several dimensions of IEP quality, indicated that students in full inclusion settings have significantly more objectives that necessitate mutual participation of the disabled student and nondisabled peers; IEPs of students with severe disabilities also reflected more objectives related to social and communication skills than students in special class programs. Data from the Engagement Scale (Hunt & Farron-Davis, 1991), which provides data concerning six dimensions of a student's engagement in an activity indicate that students in full inclusion classrooms are more often engaged with others (vs. being alone or in a 1:1 situation with a teacher), and that these students were actively engaged (vs. passively sharing) in the ongoing tasks. Finally, data from the EASI (Goetz, Haring, & Anderson, 1983) indicate that students in full inclusion classrooms have significantly more reciprocal interactions with others than do those in special day class settings.

The picture that emerges from these data sets is then one of greatly increased opportunities for social inclusion in full inclusion settings: students are more actively engaged, have IEPs with more social and communicative IEP objectives, and engage in more reciprocal interactions.

Given that the information from practitioners, litigation and research is supportive of inclusion, it would seem to be at this point a simple decision to develop inclusive programs. However, there are still many issues and barriers for state educational agencies, local educational agencies and schools to overcome if they are to effectively implement inclusive education. These issues include: 1) changing state funding formulas that have supported labeling of students with disabilities and serving these students in a separate system of services (i.e., funding is tied to labeling and placement); 2) attitudinal change issues such as the "ownership" of students with disabilities by regular schools and "membership" in regular classrooms; 3) staff development needs at preservice and inservice levels to jointly inform and prepare general and special education staff to take on new roles and develop their capacity to serve more diverse groups, as well as a need for educators to learn to work together within the context of collaborative teaming in regular classrooms; 4) ensuring that all students have the opportunity and sufficient support in regular classrooms to achieve to their capacity; and 5) developing full partnerships with service agencies, communities and parents so that schools can meet the challenges of today and tomorrow's communities. There is much to be done. We hope that this manual will be a positive step toward this exciting future.

National Full Inclusion Site Network

Specific models for inclusive programs are being developed throughout the country. See Appendix A for the National Full Inclusion Site Network CRI developed in 1992. Inclusive programs are always evolving... improving. This network of inclusive schools has just begun. This list includes only those schools who responded and agreed to be included in the network and in this published list. However, it is our opinion that these inclusive schools are representative of full inclusion programs across the nation.

II. SERVICE DELIVERY MODELS FOR INCLUSIVE EDUCATION

By: Ann Halvorsen

Introduction

Stainback and Stainback (1984; 1988) were among the first proponents of the Regular Education Initiative (REI) who called for a merger of special and general education, early in the school integration movement. Gartner and Lipsky (1987) supported the unification as well, and blamed the expanding separateness of special education on the "exclusionary practices" of regular education, which had been heightened by deep cutbacks in a variety of programs for at-risk students. Sailor, Anderson, Halvorsen, Doering, Filler, and Goetz (1989) discussed the unfortunate adversarial context of the 1980s' REI, and agreed with the previous authors that the most promising strategy for unification is the "integration of students into general education programs at the building level" (Gartner & Lipsky, 1987, p. 385).

Central to the discussion regarding integration is the issue of "home school," or students' attendance at the schools they would attend if they did not have disability. While it may be "administratively inconvenient" to provide necessary support services at each student's home school (Sailor, Gerry, & Wilson, 1991), doing so may well facilitate the other critical aspects of a quality integration program noted above, such as heterogeneous groupings, natural proportion of students with disabilities, participation in all aspects of daily school life, and the development of sustained social relationships among typical students and their peers with disabilities (Brown et al., 1989a, 1989b; Sailor, Gerry, & Wilson, 1991; Thousand & Villa, 1989). Since attendance at one's home school generally will result in a natural proportion of students as well as diversity among these students in terms of age, specialized needs and related factors, it may in turn lessen any undue impact on general educators' class sizes as students are included. This is less likely to create a "we-they" atmosphere within the school than when students with disabilities are clustered together for administrative convenience (Brown et al., 1989a; York, Vandercook, MacDonald, & Wolff, 1989). In addition, as Brown and his colleagues noted (1989a), the home school can provide the most meaningful and individually appropriate instructional environments, while giving parents and siblings increased access to services for and with the student. Thus, home school attendance can assist students with disabilities to become true members of their school community, rather than simply "visitors."

As the home school has become the setting of choice, debate has shifted to consideration of the primary location for delivery of the student's educational program within the school. Numerous authors have presented cogent arguments in the form of position papers (Forest, 1987; Stainback & Stainback, 1988; Strully & Strully, 1989; York et al., 1989) and entire textbooks (e.g., Stainback, Stainback, & Forest, 1989) which support basing students in their age and grade-appropriate general education classes for all or significant portions of the school day (Raynes, Snell, & Sailor, 1991; Sailor et al., 1989).

This integration model has become known as full inclusion, inclusive education, or supported education (Forest & Lusthaus, 1989; Snow, 1989; Stainback, Stainback, & Forest, 1989). Qualitative evidence (e.g., Schnorr, 1990) and anecdotal accounts have supported the belief that anything short of full time regular class membership merely reinforces notions of "otherness," or the perception of the student with disabilities as a mere visitor to the school community (Biklen, 1989; Schnorr, 1990). Some have argued that the central question of interest is less one of full time general class placement than it is one of appropriate curriculum adaptation to address individual students' needs within the regular class and surrounding school (c.f., Williams, Villa, Thousand, Foxx, 1989). While other authors seem to suggest that the regular class is an inadequate setting to address the learning and performance characteristics of students with severe disabilities (Brown, Schwartz, Udvari-Solner, Kampschroer, Johnson, Jorgensen, & Gruenewald, 1991), some purport that appropriate individualized modifications and support services can facilitate meaningful inclusion of all students.

Sailor's definition of full inclusion (1991) cited in the Introduction addressed the critical points of this discussion. PEERS guidelines for implementation of full inclusion (1991) can be found in Appendix B.

As we move toward primary membership of students within their age and grade appropriate general education classrooms, models for inclusive service delivery are of major concern to districts and parents. The models delineated below were generated from (a) descriptions provided by respondents to the surveys, (b) program observations and interviews in California and Colorado by the manual's authors, and (c) a review of the literature.

Three primary models emerged for K-12 aged students in inclusive programs which we described as: (1) itinerant categorical specialized support; (2) itinerant non-categorical specialized support; and (3) resource specialist/building case manager with itinerant support. Variations of these to fit pre (3-5) and post school (19-22) aged students are discussed briefly, as well as efficacy and funding/policy issues which impact the service delivery approach.

Itinerant Categorical Specialized Support

Students served through this approach are regular members of their home school general education class (elementary level) or classes (secondary level). They "count" as any other student counts on the roster for contractual class size and state class size limits, even when they may not "count" for general education average daily attendance (ADA). Their full time teacher(s) is/are the general education teacher, with collaborative, specialized support provided by the special educator, who may be described as an Inclusion Facilitator (Vermont and New Hampshire), a Support Teacher or Integration Specialist (California). (These terms will be used interchangeably throughout this manual.) Additional specialized direct and/or consultative services may be provided in an integrated manner by a paraprofessional, a communication specialist/speech-language therapist, occupational or physical therapist or other related services depending on the student's individualized education plan (IEP). All of these specialized services are provided on an itinerant, part-time basis, the schedule for which is determined by the individual student planning team, and which is likely to be influenced by the ratio of students to staff.

Ratios

General and special education class sizes vary widely across the nation. California is currently the highest for general education class size in 1992, with 32 students maximum. Districts in extreme financial stress may receive waivers to have higher class sizes, and the authors have witnessed as many as 36 kindergartners in one class. Therefore, the amount of support provided to students with identified, unique needs is a critical issue. California's inclusive programs that are fairly homogeneously grouped (i.e., all students labeled as having severe handicaps on the same teacher's caseload), may have from five to 10 students served by one itinerant teacher and two paraprofessionals. Frequently, programs are initiated with four to six students, with the understanding that numbers are expected to increase within the school year, as new students/schools become participants in the program. Other states with different funding formulas (discussed below) may have more paraprofessionals and/or be able to maintain a smaller (5-7) group of students that are served by one support teacher.

Staff Roles

Collaborative teaming processes are discussed in detail in the next chapter. The prevalent finding to report here is that in the ***itinerant categorical model***, the majority of individualized adaptations to core curriculum appear to be considered the primary responsibility of special education staff. This is particularly true early in the inclusive process, and has been reported to change as roles increase in fluidity over time. Adapting curriculum is certainly not new to most special or general educators. The major role change for special educators in inclusive programs is that of moving from a classroom teacher to a support teacher role, becoming an instructional specialist within general education classes (Peterson, LeRoy, Field & Wood, 1992). The major change for many general educators is having additional teachers sharing the instructional load, classroom, and related responsibilities. This is a big change for many people who have worked autonomously prior to this.

Within/Across Schools

Our research indicated that support teachers in this model may be based in one school, or travel among as many as four schools in a given community. The number of schools is, of course, directly tied to: (a) numbers of students on the teacher's caseload; (b) number of students attending their home schools or public schools of choice; (c) the type of community/governance structure; and (d) the categorical nature of this model. We have discussed (a) ratios or caseload above; (b) and (c) are closely related to each other. For example, in a sparsely populated rural area, there may be very few central schools, which can lead to many students attending the same home school. Conversely, in a community with multiple, small elementary schools aligned with each neighborhood, the number of different home schools to be served by a single teacher is likely to increase.

For example, in **Napa, California** there are 21 elementary schools in a rural "small town" district with a total enrollment of about 14,000. Napa operates all of its own special education services. This is an unusually large number of elementary schools, most of which are small (250 or less). Inclusive programming began in 1991 with seven students in three schools: four in one morning kindergarten, team taught by the general education and special education support teacher; two in two grades at a second school, and the seventh in a third school. Three paraprofessionals (two half-time, one full time) supported these students. The district now has a total of eight elementary schools offering inclusive options in 1992-1993, and is using a variety of staffing patterns to support them, as fits the individual student and site. The present model, as well as non-categorical itinerant support, resource specialist support, and special class support are among these.

In **Davis, California**, a college community 20 miles from the state capitol with a total enrollment of 6,100, the County Office of Education has operated an inclusive program for four years in students' home schools. This is also a "categorical" group of students with severe disabilities however, with much heterogeneity across students. The program began with four students in three schools, staffed by one support teacher and two paraprofessionals, with an expectation of growth. It grew to 10 students among these same schools, all in different classrooms, by the end of the first year. The staffing has remained the same, with one of the three staff as the primary contact person for each school. Volunteers from the university community serve as a source of support to all classrooms in Davis.

The administrative or governance structure often influences the home school factors. When an intermediate unit (e.g. Board of Cooperative Educational Services, County Office of Education, etc.) administers and operates programs over more than one district, they may design the itinerant program to serve schools across districts. We have frequently witnessed this multi-district approach to itinerant service delivery early in the inclusive process. It appears to be followed by increased ownership of programs by home districts, and an adaptation of the model which will lessen the number of schools involved. This has led in some cases to the ***itinerant non-categorical specialized support approach***.

Itinerant Non-Categorical Specialized Support

Students served in this manner are also regular members of their home school general education classes, and "count" on rosters as above. Their full time teacher(s) is/are the general education teacher, with specialized assistance from a special educator/support teacher and related service personnel. The primary difference from the first model is that the inclusion facilitator is working with identified students across categorical groups, i.e., students with learning disabilities, emotional disabilities, severe multiple disabilities, physical or communicative disabilities. The disabilities of some may be considered mild, and others severe. This model is facilitated by teacher credentialing or certification standards like New York's or Vermont's, where, e.g., special education or consulting teacher is the certificate endorsement, rather than disability specific labels or in some cases by a variance/waiver to state regulations.

The non-categorical approach can work in other states as well, in spite of credentialing constraints. Usually, teachers are permitted to instruct students outside of their certification area as long as this does not compromise the majority of the group. For example, in rural Colusa, California, a teacher credentialed in general education as well as special education for students with severe disabilities, works supporting students labeled learning as well as severely disabled, with two paraprofessional support staff, as well as itinerant related services.

Schools and Ratios

The non-categorical approach may have several advantages for districts. First, staff are generally able to stay at a single school to meet their caseloads. A school with 200 students is likely to have 20 home school students with IEPs. In Colusa, 16 included students are served by 1.5 teachers and two paraprofessionals. Travel time is excluded for direct staff, and they are viewed more as regular faculty by the school. They, in turn, are more visible and able to contribute to the daily life of the school (committees, events). Administrators report that having specialized staff on site full time helps alleviate many concerns of general education teachers. This may then increase the ownership of students with identified needs by their general education classrooms. A final reason that this is the preferred approach in many areas is that it provides for the inclusion of all students in a given school. Too frequently, we visit schools which include their students who are labeled as having severe disabilities, while still isolating those with learning disabilities in special classes or "resource rooms."

Resource Teacher as Case Manager with Itinerant Support

This model seeks to include and utilize the specialized staff onsite to address daily issues and to co-supervise paraprofessionals with the general educators involved. Additional inclusion facilitator support is provided to the resource teacher, to assist with students who have extensive needs. In **Paradise Valley Unified School District in Phoenix, Arizona**, this type of program operates in six schools, for 12 students who have severe, multiple disabilities, along with students with more mild to moderate educational needs. There are usually two students with significant disabilities in each school, and one paraprofessional assigned to cover those two classrooms. The inclusion facilitator comes to each school on the average of once every six days, and has ongoing contact with paraprofessionals, resource and general education staff through team meetings. The resource teacher has the immediate responsibility for day-to-day oversight of the program. Generally, the student is part of the resource teacher's typical caseload and specific training may be needed for the resource teacher on an individualized basis. In **Williams Unified School District in Williams, California,** both inservice training and a paraprofessional with experience in community intensive instruction were provided to support the resource services for included students.

Each of these approaches emphasizes the philosophy that special education is not a place, but rather a set of services that is individualized to support students' education in their home schools, with their age peers.

Preschool and Post-School Approaches

All of the models described above have applicability to younger and/or older students. The preschool inclusive process is fairly straightforward when public preschool programs are operated for any student in the district, as is the case in Colorado and some other locations. Many other states provide state preschools or child development centers for financially eligible students; these can serve as appropriate inclusive classrooms for their peers who experience disabilities. Without these systemic programs, districts and families are in the position of creating inclusive options with private providers, recreation departments, HeadStart, or other federally/state funded programs. This requires the same type of interagency collaboration as post-school transition planning, and many of the same key players may be involved in the process: families, schools, developmental disability service agencies, universities/community colleges (which may have early childhood education training programs) and private preschool/day care providers. A task force initiated by the schools can generate a great deal of enthusiasm for inclusive preschool programs. In **Solano County, California**, such a county-wide task force has operated for two years and includes county/district special educator representatives of teachers and administration, parents, community college Early Childhood Education (ECE) Program Director, local HeadStart and Recreation Department personnel, day care operators, preschool operators, infant program representatives, district general education teacher and principal representatives, and State Department of Education consultants. Multiple trainings have been designed and implemented through the group for both special education and ECE personnel, and several integrated, inclusive and team-taught options have been developed, i.e., (1) nondisabled preschoolers from the neighborhood integrating into a special education preschool class, (2) ECE "lab school" enrolling and integrating students from a nearby preschool special center, (3) students receiving specialized services while attending private preschool/day care, and (4) collaboratively designing recreation department/district preschool programs for all children.

Post school inclusive options require the same level of planning and fostering of investment among key stakeholders. Some K-12 school districts in California have been able to develop exciting inclusive school/work programs with their local community college district through collaborative planning. A program of this type exists at **Shasta College in Redding, California**. This program was developed by the Shasta County Office of Education. Although the strategies for systems change and program development may be the same as those used within a school district, the multiple-agency nature of most pre- and post school planning increases its complexity. However, these apparent barriers are far from insurmountable, and the benefits to students are well-documented (cf., Sailor et al., 1989; Halvorsen et al., 1989).

Considerations in Service Delivery Model Development

Four areas should be considered when designing inclusive service delivery options for all ages of students: (1) the community type (urban/rural/suburban) and fit with local resources; (2) the state funding model or formula and the amount of local control in funding allocations; (3) staff strengths and training needs; and (4) expected role changes or changes in job descriptions, and their potential impact on collective bargaining agreements.

Type of Community

This factor can appear to be limiting in a rural community with an extremely low incidence of disability and few corresponding resources, or it can be viewed as an opportunity for innovative options, such as the non-categorical itinerant services of Colusa, or the use of resource services in ***Susanville, California***, a rural town in the Sierra Nevada Mountains. The local community "fit" is no less of an issue in large urban centers and suburban areas. For example, where restructuring efforts are underway with a strong site-based management component, then an approach which allows key staff a single school assignment may be the option of choice.

State Funding Model

In some states, such as Vermont, funding follows students across settings and/or support services. This simplifies the design of inclusive programs to some extent, as per-student funding can be combined to create a viable staffing support pattern. Currently, in states such as California, funding is attached to "units" which are the "instructional personnel services" allotted to specific service models, e.g., special class units, resource specialist units, related services units. A "special day class" (SDC) description in the state Education Code indicates that students will attend the special class for at least 50% of the school day. The highest ratio of support

(1 teacher to an average of 10 students – not less than an average of 9 across district SDCs) is attached to the SDC, so this is the preferred unit to utilize. Districts in California can apply to the State Board of Education for a waiver to allow for itinerant use of one or more special class units for inclusive purposes. Waiver applications must demonstrate that (1) the need for this inclusive option is IEP-driven, (2) the support will be utilized appropriately to address student objectives and meaningful outcomes, and (3) program evaluation will be designed and implemented. Reviewers of these waivers are also particularly interested in how specialized support will be both protected from "abuse," as well as how it will be shared as appropriate to benefit all students.

In most states, appropriate waiver procedures will prevent loss of special education funding for included students, and may facilitate itinerant as well as cross-categorical approaches.

Staff Strengths and Inservice Needs

This question requires consideration of the needs of all members of the school community, including family members. The manual on systems change now in preparation by CRI and PEERS, Systems Change: A Review of Effective Practices addresses this area in detail (Karasoff, Alwell, & Halvorsen, 1992), and the next section of this manual covers team-building and collaborative skill development. It is important in this context to note that the skills and needs of all team members in a given situation may help to determine which inclusive approach is most appropriate, not whether inclusion can be implemented. For example, if students have multiple physical needs some of which require medical attention, it may be most critical to have trained staff on site. This might mean that a resource option is not viable for one school, yet in another school, where the resource teacher has the required background and is excited about acquiring new skills, it may work exceptionally well. Local design based on an intimate working knowledge of the skills and attitudes of school personnel will be critical to model effectiveness.

Role Changes/Job Descriptions

Processes for role changes will be discussed in upcoming sections. The issue of roles and job descriptions can impact the service delivery model choice when those roles are limiting in some manner. This occurs when specific support options are categorically defined or identified (e.g. resource teachers = students with learning disabilities). Although this should not be the case, there are often subtle vestiges of these limits in contracts or regulations. Another issue may be paraprofessional roles: some areas have utilized "custodial" paraprofessionals as support to students with physical disabilities. These job descriptions may need broadening or redefinition to include increased instructional expectations. This is particularly important in light of the many "aide-dominated" situations we encountered during our research, where as many as 10 paraprofessionals worked with a single inclusion facilitator, fanning out to support students across individual classes. This is not a model we endorse because: 1) questions arise immediately as to supervision and evaluations of professionals (whose responsibility with what criteria); 2) we must have realistic expectations of paraprofessionals, who bring a broad range of educational and work experiences to traditionally underfunded positions, and most importantly; 3) the barriers this approach may impose to developing and maintaining shared instructional ownership and students' relationships with their peers.

Policies and Procedures that Support Inclusion

Finally, it is encouraging to note that many states are adopting specific legislation (Michigan), policies (New Mexico, Vermont), or procedures (California, Colorado) that facilitate inclusive or supported education. Many of these can be found in the systems change manual referred to earlier (Karasoff et al., 1992). The 16 Statewide Systems Change for Integration projects funded to date, between 1987 and 1992, have fostered these efforts in each participant state, and have shared effective strategies across states. Inclusive education has grown across the country, from, for example, a single request in California in 1987, to the primary option for which technical assistance is requested in that state in 1992 (Halvorsen & Neary, 1992). Other states have similar and equally exciting stories to tell.

III. BUILDING LEVEL SUPPORT AND STRATEGIES

By: Robi Kronberg

Introduction

The effective schools movement has provided an impetus to re-examine historical beliefs and practices related to education and educational outcomes for all students. As new questions are asked related to the efficacy of education, new answers are emerging which allow parents, educators and community members to embrace new possibilities and renewed dreams for students with disabilities (Block & Haring, 1992; Roach, 1991; Hornbeck, 1992).

Many supports and strategies have been utilized by building level staff who are committed to increasing their collective capacity to effectively meet the needs of diverse learners, including those with the most significant disabilities. Critical to the process of clarifying and implementing supports and strategies has been the need to examine district and building level governance structures as described in the previous section. Common barriers to building level change often include governance structures related to job descriptions; transportation; supervision of staff; budget allocation; funding inflexibility; personnel practices for hiring, reassigning and firing; and teacher certification standards.

To align resources with the structures that support inclusive education and diminish or abolish the structures which inhibit or restrict inclusive educational practices, it is first necessary to identify those structures. In moving to inclusive educational practices, each school site responding to the CRI survey has at some level effectively addressed those governance structures that initially supported and perpetuated special education as a separate system. Subsequently, inclusive school sites are designing and implementing merged systems, capable of meeting the educational needs of all learners.

School communities that are actively and effectively engaged in teaching all students regardless of labels and learning needs share similar attributes. Throughout the literature, these attributes most often encompass the following:

1) a shared vision with a corresponding mission statement reflecting a belief and value base that all students can learn and have a right to be educated with full membership status alongside their typical same-age peers;

2) administrative leadership capable of maintaining focus on the stated vision and empowering staff to continually progress towards the jointly derived mission and purpose (Schattman & Benay, 1992; Villa & Thousand, 1989);

3) a school climate and culture of positive acceptance of and respect for the gifts and talents of each individual comprising the school community;

4) staff development structures, both informal and formal, designed to increase staff understanding related to beliefs and vision as well as ongoing skill development and knowledge refinement and enhancement (Schattman & Benay, 1992);

5) building level structures that encourage collaborative teaming among adults in order to support effective communication, problem-solving and ongoing evaluation (Rainforth, York, & MacDonald, 1992); and

6) building and classroom based strategies that accommodate to the diverse range of individual student styles and learning preferences.

Villa and Thousand (1988) pointed out the need for school staffs committed to inclusion to acquire a common conceptual framework, language and set of technical skills in order to communicate about and implement practices which research and theory suggest will enable them to better respond to a diverse student body.

Shared Vision for All Students

It is widely accepted that inclusive schools need to embrace a shared vision for educating students. Within that shared vision rests beliefs expressing equity for all learners and a commitment to meeting the needs of all learners through dignified and productive means (Kaskinen-Chapman, 1992; Ayres & Meyer, 1992). In schools that are successfully providing an inclusive education for all their members, the vision for special education services is a part of a larger vision for quality educational outcomes for all students. This vision, often within the context of district-wide restructuring "seeks to unify the system and create a place for all of the students in the system" (Center for Policy Options in Special Education, 1992).

School communities that translate their vision into an operative mission statement, written and agreed to by all members of a school community, have the opportunity and the accountability to recognize and act upon any subsequent action that is discrepant with the stated beliefs. This ongoing analysis between stated beliefs and current practices provides a fertile environment for dialogue, questioning and resolution of inconsistencies. As stated by one survey respondent, "The idea of inclusion is really belonging and that is a human right. It should not have to be earned... This is a moral issue not just an educational one. Everyone can fit if we want them to."

Important building-based activities, helpful in bringing life and commitment to a mission statement, involve such things as: orienting new staff, students, family members and community members to the school's stated mission; providing opportunities for staff members to see and experience the vision by visiting other inclusive school sites, networking with colleagues etc.; maintaining an open dialogue that continually questions and addresses the barriers preventing the realization of the mission statement, revitalizing and renewing a commitment to the vision and celebrating successes and progress!

Administrative Leadership

The attributes of successful inclusive school sites are dependent on the leadership of the superintendent and Board of Education, and the visible and active support of building level administrators. Although schools differ along such dimensions as student enrollment, demographics, and geographical location, administrative leadership remains pivotal for initiating, maintaining and continually refining innovations that support inclusive education (Karasoff et al., 1992).

A key role played by building administrators of inclusive schools is related to guiding the vision and the implementation of the mission statement. Building level administrators, able to set a clear philosophical direction for themselves and their school staff, provide ongoing encouragement and empowerment to continually progress towards the articulated vision (Villa & Thousand, 1990). In inclusive schools throughout the nation, administrators participate on teams and in instructional decisions, and share responsibility for achieving collaboratively established goals (Schattman & Benay, 1992).

Along with communicating a clear direction, building level administrators have the ability, as participants in shared decision-making, to reallocate resources, support staff throughout the change process, critically examine existing beliefs and structures, assist in redefining roles and responsibilities, and encourage the implementation of innovations.

As schools move toward site-based management, areas that were once the domain of others now come under the leadership of building level administrators (cf., Sailor, 1991). In many instances, this shift has created a need for principals to assume instructional responsibility for students for whom they were not previously "accountable." In turn, this need has created an impetus for principals to seek training and new knowledge to better equip them to educate all students in their respective schools. Principal-focused training opportunities, such as Schools Are For All

Kids (SAFAK) developed by CRI (1990), or the Principal's Training Simulator in Special Education (PTSSE) developed by Dr. Leonard Burrello (1988), have greatly assisted building level administrators in acquiring both the vision and skills necessary for providing leadership to effective inclusive schools.

In an attempt to design building level structures that support the inclusion of students and services it has been necessary for administrators to assist staff in examining current practices. It has been the authors' experience that one of the more critical areas of leadership and guidance has been in the redefinition of job roles and responsibilities. It is evident that categorically assigned roles and responsibilities of adults no longer match the needs of students as those students become inclusive members of regular education classrooms.

Important issues to address when rethinking staff roles and responsibilities include: creating a new paradigm for sharing ownership of students and how that is to be operationalized in specific schools; aligning job descriptions to more closely match the new paradigm; defining the supports needed by staff in order to successfully carry out new job roles; creating opportunities for people to network with others who have undergone similar role changes; and acknowledging the performance of newly acquired roles and responsibilities. Once again, a multitude of traditional governance structures are impacted when professional roles and responsibilities are redefined, and many of these have to be changed to allow a new paradigm to guide current and future practices.

The capacity of individual schools to effectively educate a diverse student population (including those students labeled as having the most significant disabilities) continues to expand. The potential for each member of a school community to contribute as both a teacher and a learner is limitless. As new strategies are developed and current strategies refined, new futures and dreams are continually being created for those that participate in a community that values and supports each member.

Positive and Accepting School Climate and Culture

Building a sense of community in a school building is essential in order to foster a sense of acceptance, responsibility and cooperation among students and adults. Many educators have noted the pervasive importance of creating a positive and accepting climate and the effects that has on all members. "To build a sense of community is to create a group that extends to others the respect one has for oneself... to come to know one another as individuals, to respect and care about one another and to feel a sense of membership in and accountability to the group" (Likona, 1988, p. 421).

School staff utilize a myriad of ways to achieve caring communities that openly extend warmth and acceptance. Many schools promote activities that increase awareness as to the diversity of gifts and talents of all students and staff by highlighting "ability awareness," as opposed to the more traditional "disability awareness," and by infusing this content within specific areas of the core curriculum. Some classrooms build a sense of community and accountability by creating individual and group responsibility through class meetings, circles of support, ongoing forums, or other strategies designed to support authentic validations of feelings and concerns as well as empowerment of the collective ability to solve daily problems and challenges.

In schools and classrooms where cooperation is the expectation and is thoughtfully and conscientiously modeled by all school members, a different sense of belonging and caring emerges. These feelings of belonging, caring and acceptance extend to all members of the school community as children and adults actively engage in mutually supportive activities and behaviors (Sapon-Shevin, 1990; Shaps & Solomon, 1990).

Staff Development

Successful inclusive education sites have developed a single staff development focus representative of the needs across school staff. Common goals and needs are defined that address diverse student needs and targeted populations. Although somewhat subtle in impact, this merged staff development agenda also models the integration of curriculum, the application and generalization of instructional innovations, shared knowledge built around a common conceptual framework, consistency of language and the opportunity for staff members to be jointly engaged in mutual learning. "Inservice training must be ongoing and dynamic and must empower practitioners and parents to support one another as they define the shape an innovation will take in their schools and classrooms" (Ayres & Meyer, 1992).

Many schools have reported the importance of designing both informal and formal vehicles for staff development. A multi-focus approach that combines information and knowledge related to both values as well as knowledge of implementation strategies is key in providing meaningful opportunities for adults to learn, grow and successfully meet the challenges posed by a diverse student body (Flynn & Innes, 1992). Again, an example of a multi-focus approach for school site team training is Schools Are For All Kids: School Site Implementation – Level 2 (Roger, Gorevin, Fellows, & Kelly, 1991).

Key components that have proven helpful to infuse into staff development offerings include: (1) teaching people to engage in perspective-taking to enhance the understanding of issues; (2) creating a learning atmosphere that encourages the development of multiple strategies, one that supports the notion that there are "many right answers"; (3) providing staff development opportunities that respect the adult learner and offer a variety of formats for teaching and learning and; (4) encouraging personnel to share areas of new knowledge and expertise.

Inherent in effective staff development is the ability to accurately assess what staff members need. Inclusive education sites have found it important to limit assumption-making and ask members of the school community to define their individual needs. Also critical is the realization that needs change over time. Schools that have operationalized this effectively offer new information and knowledge in varying levels and intensities and support adults through mentoring and peer coaching approaches in order to ensure generalization of new information to different contexts. New strategies for supporting students, different instructional methodologies, and refined techniques for communication among adults are just a few topics that are offered throughout the year as the needs and interests of "implementers" change over time (cf., Karasoff et al., 1992).

Collaborative Team Structures

It is widely accepted that the success of inclusive education rests upon the ability of adults to share ownership of all students. Inherent in the willingness and the ability to share ownership of students is the willingness and ability for adults to engage in collaborative teaming. School communities that actively support teaming offer an environment rich in respect for individual contributions as well as an expectation for the development of mutually supportive relationships among and between adults and students.

Given the complexities of educating children in today's world no one person holds all the answers. When general educators from Colorado were asked to define their key support needs related to effectively including students with severe disabilities, many responded that the opportunity to brainstorm with team members was critical (Kronberg, Jackson, Sheets, Rogers-Connolly, 1992). One general education teacher in Commerce City, Colorado (Adams County District #14) spoke recently about the fact that teaming increases general educators' willingness to include students with significant disabilities, students they would have hesitated to "take on" if they were working alone in single classrooms (CRI Topical Meeting, September, 1992). Building level staff are realizing the importance of blending multiple areas of expertise, engaging in joint problem solving and participating in shared decision making. In this type ofcollaborative teaming, team members work cooperatively toward common, agreed upon goals (Karasoff et al., 1992). The ability of a building level staff to collectively generate solutions to educational challenges far exceeds the capacity of one individual working in isolation.

Effectively meeting the needs of a range of diverse learners requires that school personnel engage in constructive adult-to-adult interactions. Initially, it is often assumed that adults will automatically know how to "team." The majority of school communities quickly arrive at the realization that a thoughtful and thorough approach that teaches effective teaming skills and provides ample opportunities for practice is needed, just as it is necessary for students working cooperatively.

Skills critical to maintaining effective adult-to-adult interactions include such general areas as: recognizing and capitalizing on adult's natural strengths; providing information relative to processes of group growth; providing forums for on-going interaction and dialogue; acknowledging fears, anxieties and dreams; creating vehicles for adults to share mistakes without fearing reprisal; empowering adults to share successes, learn from each other and have fun; validating the importance of taking small steps; and providing opportunities for adults to take care of themselves.

In examining team structures and functions across respondents from inclusive education sites, variability was expressed as to:

1) the membership of each working team;

2) the frequency and duration of meeting time;

3) the availability of all identified team members to meet on a regular basis.

It was also apparent from the variety of responses that many types and layers of teams are utilized across inclusive education sites. "Layers" of teams ranged from ongoing student-focused instructional teams comprised of the special educator, general educator, and paraprofessional(s) to student planning teams (discussed in greater detail in a subsequent chapter) comprised of special education staff, related service providers, parents, and identified general educators which also form the basis for annual "IEP team" meetings that convene once per year.

The majority of sites surveyed utilized two types of teams. The first team configuration was often described as a "working team" comprised of a small number of people who have ongoing contact with the identified student. This *working team* met on a regularly scheduled basis. Names often associated with this type of team included: "student planning teams," "instructional planning teams," or "support teams" which are discussed in detail in Chapter V. The second type of team described was a *formal team* characterized by a larger group of people, often including central administrative personnel who might have only limited contact with the identified student. This *formal team* met on a less frequent basis, often to accomplish a specific, episodic task.

This second type of team described by several respondents was that of a *building-level support team.* This team, rather than focusing primarily on the needs of identified students, focused on the collective needs of the building. Often these teams were organized and maintained to address initial development as well as ongoing questions and issues related to the implementation of inclusive education. Members of these teams described their responsibilities as representing their grade level team, bringing a "voice" to other staff members' concerns who are affected by issues but do not serve on the team, actively listening to fellow staff members, and supporting the change process. The majority of these teams reflected building-wide representation and were generally perceived as supportive by staff. Principal participation on this team was frequently mentioned as a critical feature of its effectiveness.

As noted above, in addition to defining team purpose and clarifying team membership, specific skill building is critical to enhance the functioning of any team. Throughout the literature, it is widely recognized that in order for a team to engage in effective teaming there are necessary behaviors that must be learned and actively practiced. These behaviors include:

1) trust among members
2) shared goals
3) respect and support for individual differences
4) willingness to share the workload, challenges and successes
5) positive values for collaborative structures
6) flexibility
7) frequent face-to-face interaction
8) positive interdependence
9) individual and group accountability
10) interpersonal skills related to communication, resolution of conflict, problem-solving, decision making, role-release, etc.

(Villa & Thousand, 1992; York, Vandercook, MacDonald & Wolff, 1989; Johnson & Johnson, 1987).

Individuals associated with inclusive schools have continually shared the initial difficulties in forming a team and creating positive adult-to-adult partnerships. However, they have also shared the positive outcomes of effective teams for both students and staff. Schools that believe in, and actively implement collaborative teaming processes, model a cooperative philosophy reflective of shared decision-making, collaborative service delivery, and mutually supportive relationships. Through the utilization of these teaming processes, many school personnel report greater flexibility for releasing and sharing roles and a far richer environment for personal and professional growth.

Despite the knowledge that collaborative teaming processes are necessary to effectively meet the needs of all learners in a given school, many sites responding to the survey as well as others known by the authors expressed the difficulty experienced by a lack of time to engage in meaningful team interactions. Often, teaming became an add-on to an already full schedule, and building-level staff found themselves meeting before and after school or in short moments of "catch people when you can" throughout the school day.

One elementary school in Colorado realized the need for school-wide planning time. The student day was extended 15 minutes Monday through Thursday and the additional 60 minutes gained was then utilized to dismiss students 60 minutes early on Friday. That time was used as a weekly collaborative team planning hour. Other schools have utilized a rotating substitute once a week or bi-monthly to provide coverage to teachers in blocks of time throughout the day. Still other schools have utilized existing cross-grade activities where one teacher takes responsibility for an activity across two grades or classrooms in order to free up another teacher for a short period of time.

Until district and building level structures and policies that govern scheduling, contract hours and other critical factors change, it is incumbent upon staff to maximize what meeting time they do have. Strategies for effectively and efficiently creating and maintaining team structures include:

(1) establishing and prioritizing agenda items;

(2) allocating time limits for each item;

(3) designating and sharing roles during team meetings of time-keeper, facilitator, recorder and if helpful, process observer;

(4) distributing minutes to interested people; and

(5) following through on designated tasks and timelines.

Sample team meeting forms, submitted by survey respondents follow this page. Some respondents favored a strategy where the agenda is structured around successes and challenges, with each meeting opening with a review of successes to date, followed by problem-solving around remaining challenges.

Building Strategies to Support Diverse Learners

As schools have moved closer to providing inclusive educational experiences for students, it has been important to examine the building and classroom structures and critically question their compatibility with the stated mission to meet the needs of all learners. School-wide structures such as discipline, grading, class placement, professional role delineation and retention are among those which have been revised as staff members seek to "walk what they talk."

Hansen Elementary School in Adams #14 School District in Commerce City, Colorado dramatically transformed their school structure to accommodate to and enhance the learning of increasing numbers of learners with diverse needs. This elementary school now serves all of its members in multi-age groupings based on developmentally appropriate curriculum (within the relative context of each learning proficiency) for all students, regardless of label. All instructional resources were combined as a "pool" of resources and are utilized based on areas of student need rather than programmatically or categorically assigned. Collaborative team planning, considered critical to the success of this transformed school structure, occurs daily in the afternoon and is accomplished via block scheduling. This scheduling

Integration Planning Team Meeting
Minutes

School: ____________________

Students: ____________________

Teacher(s): ____________________

Date: ____________________

TEAM MEMBERS PRESENT:

TEAM MEMBERS ABSENT:

____________________ ____________________

____________________ ____________________

GROUP ROLES ASSIGNED:

Facilitator: ____________ Time Keeper: ____________

Recorder: ____________

TODAY'S AGENDA ITEMS:

1) ____________
2) ____________
3) ____________
4) ____________
5) ____________
6) ____________
7) ____________
8) ____________
9) ____________
10) ____________

ACTIONS:	PERSONS RESPONSIBLE:	TIMELINE:
1.		
2.		
3.		
4.		
5.		
6.		

AGENDA ITEMS FOR NEXT MEETING:

1. ______
2. ______
3. ______
4. ______
5. ______
6. ______

DATE, TIME, PLACE OF NEXT MEETING:

Team Minutes – December 12, 1990

ACADEMIC		SOCIAL/BEHAVIOR	
Successes	Challenges	Successes	Challenges
– Patterning/free exploration stage – Stringing beads – Language: sings appropriately, rhymes, repeats words and phrases. Understands well – Transitioning improved – Anticipates next activity – More independent – No "taste for paste." – Following directions	– Patterns needs assistance – Pencil grasp – Cutting/following pattern – Writing more legibly – Listening in a group – Dictation: Describing pictures – More eye contact – Articulation: /d/ phoneme – Stimulus activities for walking	– Comes in independently from recess – Picking partners – Using visual cues – Bonded in class – Reduced amount of inappropriate "noises" – Responds appropriately	– Not enough time to choose – Lessen noise making – Other students are imitating noises – Eating lunch more quickly – Initiating contacts with children – Making friends

Necessary aide time: First half of class time would be the more difficult. Second half easier during activity time.

Focus December/January: Start reducing aide time. Maintain a chart showing which times of the day to be most appropriate for ________________ to be working without an aide.

Next Meeting: January 23, 1991. Time: 12:45 p.m. Room: 28-P

Pitts-Conway, V. (1990). Team meeting minutes. Santa Cruz, CA: Santa Cruz County Office of Education.

format provides each teaching team with at least 50 minutes per day of planning time, depending on the team and the specific day in the weekly schedule.

Many governance structures at Hansen Elementary School have been revised as well as building and classroom structures. Most staff will agree that this dramatic level of change has required energy and commitment and the ability to maintain a focus on the larger vision. Most staff will also agree that the changes in students have been dramatic as students have become more engaged in and responsible for their own learning.

There are multiple support strategies at the classroom level and many of these are discussed in Chapter IV.

IV. CLASSROOM-BASED STRATEGIES

By: Ann Halvorsen
(Forward by Jodi Servatius, Ph.D.)

Forward

John Dewey saw knowledge in much the same way as the ancient Greeks concept of "phronesis," or practical knowing, with learners creating knowledge by connecting their lived experiences. This view of learning forms a compelling basis for defining good teaching.

In fact, knowledge is created through the interpretation of personal experience; learning cannot occur through simply receiving, repeating, or recording information. Learning happens when the student makes new connections, and actively constructs knowledge, thus becoming the "maker" of meaning. Students at different levels of achievement and experience, therefore, can benefit, although perhaps in different ways, from the same lesson. And teachers orchestrate lessons with this in mind.

In this view of knowledge, learners need some knowledge to make more knowledge. This raises the question of how to provide schools which counteracts the tendency of the "knowledge rich" to become richer while the "knowledge poor" fall further and further behind. It supports the concept of heterogeneous schools, in which learners of different backgrounds and talents learn with, and although, each other.

Recent research on knowledge acquisition also leads us to see that learning is dependent on the context in which it occurs. It is often noted that learning in school should have more of the same characteristics as learning in non-school settings. That is, new learning should be practices in "natural" environments, be collaborative, use appropriate tools, and be seen as purposeful by students. These characteristics, too, lend themselves to the richness of diverse groups of students.

If we believe that there is no learning without the active participation of the learner who relates previous experiences to a new concept or skill, we have a powerful foundation for a new portrait of what makes good teaching. Without an "empty vessel" into whom to pour information and skills, teaching becomes something very different indeed. The teacher becomes the facilitator of students' work. Good teaching then includes:

- creating a rich atmosphere for learning in the classroom;
- posing meaningful questions;
- creating diverse learning groups who bring different experiences to their work;
- engaging students as active workers;
- encouraging student collaboration;
- providing resources and materials that support learning;
- finding ways for students to become increasingly self-directed and self-reflective; and
- providing students with meaningful work and demanding quality evidence of their learning.

As we move from the "empty vessel" idea of students to one of students as active and collaborative meaning-makers, having students with different experiences, strengths and backgrounds becomes not only no liability, but in fact, a distinct advantage. It assures that different backgrounds, opinions and perspectives will be present in any given learning situation. It also realistically prepares students to become active members of the diverse adult society of which they will become a part.

As we change our assumptions about learning, we re-define what a good teacher must know and be able to do. We then must move away from formulaic notions of teaching and "teacher-proof" prescriptions for lessons. In this view, the teacher must have not only a wide variety of teaching skills and strategies, but also talent and sensitivity in deciding which methods are needed at a given time for a given group. Unlike an assembly line worker with a set routine and little discretion, and more like a pianist with a vast repertoire, the good teacher has many strategies from which to choose. This view also recognizes that although no one teacher knows everything, working and learning with colleagues both expands teacher repertoire and hones teacher judgment. This honors the teacher as a true professional whose job is enabling success for every learner. Isn't that what we say schools should do?

Array of Instructional Supports

In addition to curricular adaptations, there are multiple support strategies used by general and special educators to address diversity within the classroom, some of which have been highlighted above. Cooperative learning structures, multi-dimensional grouping with multi-level instructional techniques, team teaching with sharing of instructional expertise, block scheduling to maximize related services involvement, natural and systematic peer supports including tutoring and use of class meetings, as well as activity-based instruction are examples of these. Ayres, Belle, Green, O'Connor, Meyer, and Slavin (1992) pointed out that existing curricula in our schools can be viewed "as either a context for inclusion or (as has often been the case in the past) a barrier to inclusion" (p. 4). In each of the cases reported to us, regular education curricula were viewed as an *opportunity* and the primary instructional context. Teachers developed the support strategies described below as a means to ensure successful learning for all students, and as a corollary to the adaptation techniques outlined in Chapter V.

Multi-Level Instruction

Porter and Collicott (1992) described this as a strategy which enables teachers to prepare one lesson with individualized variations, and which involves,

> "1) identifying the main concepts to be taught in a lesson, 2) determining different methods of presentation to meet the different learning styles of students, 3) determining the variety of ways in which students are allowed to express their understanding, and 4) developing a means of evaluation that accommodates different ability levels" (p. 196).

An example of this for a junior English literature class was described by Stainback, Stainback, and Moravec (1992) where the unit was focused on studying the concept of courage through the story *My Friend Flicka* by Mary O'Hara. Overall objectives included familiarization with the story, relating the role courage played in the plot, and how this related to students' own lives. Some students' objectives focused on critical thinking aspects such as analyzing and synthesizing from story events, while others were expected to recognize characters and events. A variety of activities were designed by general and special education staff to address this variation, such as reading, listening to the story on tape, sequencing events with pictures, writing reports, and making picture books with narrated tapes depicting story events. Cooperative learning structures were utilized in conjunction with the multi-level approach to enable all students to participate actively.

Cooperative Learning Structures

This was the most frequently reported strategy in our survey group, often noted as occurring in conjunction with multi-dimensional grouping strategies, multi-level instruction, and activity-based learning. For example, Jim Jackson, principal of **Hansen Elementary School in Cedar Falls, Iowa** described an elementary science weather unit, where bar graphs were the desired product. One student gathered data, one chose the type of graph to use for reporting data, all students discussed the data and prepared the graph cooperatively, which another student colored. He reported that one of these students experienced severe disabilities. In another lesson, Jackson described how a visually impaired student participated with her group for a measuring task which involved measuring items in the classroom. The students decided that she would hold the measuring tape and repeat measurements for the recorder. During subsequent discussions the group talked about relative concepts of length and size – larger, smaller, shorter, longer – and assisted the student with disabilities in her reporting about the object's size or length.

A significant body of research has developed which demonstrates that efficacy of cooperative learning structures to address classroom diversity and ensure meaningful learner outcomes (cf., Slavin, 1991). Cooperative learning is characterized by positive interdependence, heterogeneous small group structures, face-to-face interaction with emphasis on social skills, as well as individual accountability and assigned roles (Johnson & Johnson, 1989). Johnson, Johnson, and Holubic (1986) described the role of teachers in this strategy, which, they pointed out, is truly a collaborative student-teacher approach to learning: (1) specifying behaviors; (2) assigning students in a manner that ensures group heterogeneity; (3) clearly explaining activity expectations and how positive interdependence will occur; (4) monitoring the effectiveness of collaborative interactions and intervening to provide task assistance or to assist with social skill development; and (5) evaluating student achievement and group effectiveness.

The context of cooperative learning itself facilitates inclusion of all students, and was reported by survey respondents as leading to reduced needs for multiple adaptations for the student with disabilities. This is supported by a school site study conducted by Stainback, Stainback, Moravec and Jackson (1992) who found that teachers in inclusive classrooms both reported in interviews and were observed to adhere to cooperative principles and a "process-oriented perspective" (p. 315).

It is interesting that teachers described themselves in this way, and this underscores the fact that cooperative learning structures usually occur in concert with other instructional support strategies, such as multi-level instruction, activity-based or thematic instruction, and peer participation. For example, in rural Northern California, cooperative groups, formed on multiple dimensions at the junior high level, were involved in a science unit about animal habitats and breeding practices. The group developed a simulation to illustrate salmon spawning, where students assumed a variety of roles such as currents, predator fish, etc. Ropes were utilized for the currents, and the students themselves developed the adaptations for the young man with severe disabilities, including fewer predator fish and slower-moving currents when he was taking the salmon role. The activity also provided ample opportunities for him to play other roles, while allowing for multi-level outcomes across students.

Multi-Dimensional Performance Grouping

In this strategy a variety of criteria are used to place students in groups, and these are often based on dimensions other than ability or perceived ability. This technique acknowledges that students have different strengths and weaknesses across areas, and that they are multi-faceted people. Group formation might be based on students' interests or hobbies, with varying academic achievement levels represented. In another case, grouping may be based on skills and abilities for different subjects, as well as on their ages, grade levels, etc. A third example is multi-task activity grouping, where different groups of students perform different tasks that contribute to the whole classroom (Far West Laboratory, cited in Roger, Gorevin, Fellows, & Kelly, 1991). Research has indicated positive outcomes for students in terms of friendships which were formed across ability lines, students' acquiring more varied views of each other and low-ability students having higher self-esteem and a more positive image than those in ability-grouped classrooms (Rosenholtz & Wilson, 1980).

Ferguson and Jeanchild (1992) emphasized the importance that should be placed on organizing multi-dimensional and cooperative groups which maximize variation across student characteristics. They reminded us that mere physical proximity is insufficient for the group structure to be successful. They suggested that teachers group together those with the most different characteristics, and utilize a range of these, from gender and ethnicity to task performance, communication and social abilities. For example, they recommended grouping at least one student with strong communication/social skills in a group with one student who requires extensive assistance as well as others who are verbal, "noisy," "quiet," etc. A second recommendation was to group students along task demand dimensions, e.g., balance those who need extensive assistance with those who are more able. A third caveat was to try to include each student in a group where at least one other student is a peer s/he would choose. This can be accomplished by asking students at the outset of group formation to identify (privately) three classmates with whom they would like to learn. If some were not chosen, the authors suggested surrounding them with supportive students who might become interested in developing a relationship. Finally, Ferguson and Jeanchild (1992) stated that all students should have opportunities to work with everyone in the class at different times of the semester or year.

Team-Teaching and Block Scheduling

These two strategies can be described as enhancing the general education environment for all students. Team-teaching between general and special or support teachers occurs frequently in inclusive classrooms. Schulman (1989) noted that we should not "do unto teachers what you would not have teachers do unto students" (p. 166). In other words, as we have come to recognize the value of students learning together, we must also plan for and expect teacher collegiality and collaboration in order for current reforms to succeed.

Thousand and Villa (1989) described teaching teams and their critical elements, all of which stem from cooperative learning structures: (1) frequent face-to-face interaction; (2) positive interdependence; (3) small group social skills work; (4) periodic group processing as to efficacy; and (5) clear individual accountability or responsibilities. Given this framework, they provided several case studies of teaching teams which exemplify these features. They discussed how teachers use their complementary academic and instructional expertise in shared lesson planning, and rotation of large and small group subject area responsibilities. Collaborative teaming is discussed in Chapters III and IV, however, it is important to note here that team-teaching generally evolves within the inclusive situation; it is not necessarily a given at the outset. Teachers responding to our survey discussed the development of trust and a working relationship that was necessary prior to truly shared teaching status. One support teacher "Jim," described suggesting to his colleague "Mary," his own areas of expertise, where he might make contributions such as taking responsibility for small groups, modeling lessons, and eventually taking over a portion of each instructional unit. Support teachers generally have several classes with which they are working, and so are limited in their team teaching time for specific classes. Although they may only be able to lead whole lessons once every few weeks, most stress the importance of doing so, as well as the rewards for them in being part of the total classroom, and perceived as such by the students.

Block scheduling of support teachers, paraprofessionals, and related services staff time can facilitate collaborative teaming. Rainforth, York, and MacDonald

(1992) described strategies utilized by therapists to increase support to included students: allocate half or full-day blocks of time to a designated group, add a rotating element so that different students can receive support on different days, and add "flex time" to allow for consulting with team members and catching up on any missed activities. In this way, therapists and/or teachers and paraprofessional staff can schedule time to support students during critical periods while working on specific objectives, provide activity-based community instruction opportunities for general and special education students in the class, and/or conduct lessons for the class and team teach. For example, speech/language therapists in this model may provide language arts instruction for all students in the class and adapted physical education teachers can team teach physical education classes. These services to the total class are an integral support cited often by general educators.

Activity-Based Instruction

Active learning or hands-on approaches have been referred to several times in this section. These are inherent aspects within process-oriented classrooms that utilize cooperative approaches. Peterson, LeRoy, Field, and Wood (1992) summarized a range of techniques including simulations, applied learning stations, role play and demonstrations, community-referenced projects and community-based learning, all of which provide for diverse ability levels and interests. A few examples of each from our experience are listed below.

- **Simulation**

  Science: Salmon-spawning activity described above (junior high)

  Math: Operating a small business within the school, e.g., restaurant, errands, and delivery service (elementary). In both, essential elements of a real-life activity are acted out or replicated in school (Peterson et al., 1992)

- **Applied Learning Stations** which are structured for independent activity and team work at a variety of ability levels.

  Social Studies: Each station is geared to address a different aspect of a country under study, e.g., music, government, geography, foods. Students rotate among stations over a two or three week period, mastering specific activities according to their objectives. For example, in the geography station, students might read and discuss the information, and decide what type of representative medium to use from several options, i.e., drawing a map, building a map representing terrain, developing maps on a computer graphics program, etc.

- **Role Play and Demonstrations**

  Peterson et al. (1992) described this as a valuable tool for student learning of basic knowledge and higher order concepts. Role playing has proved to be an effective tool in the past in providing ability awareness information to nondisabled peers (cf., Murray & Beckstead, 1983), and has been paired with demonstrations for this purpose. Peers have developed formats for providing learning station demonstrations and structuring role plays to assist their same-age peers and younger students in acquiring information about individuals with disabilities; this has occurred within the contexts of science, literature, and social studies subject areas from upper elementary through high school (e.g., Project LEAD, 1989).

- **Community-Referenced and Community-Based Projects**

  Students learning about environmental issues through a social studies, English, and science integrated unit might work in groups to (a) identify a problem area, (b) write to activist groups for more information, (c) develop a position paper/report, and (d) conduct an advocacy letter-writing campaign to address the problem. As they are learning through these more traditional methods, they might also combine the strategy with community-based activities, e.g., visiting waste facilities, photographing problem areas, interviewing officials. There is a wealth of activities within our communities which can engage students in active learning. Many secondary schools sponsor service programs within a range of agencies from preschools to hospitals, parks and museums. Partnerships with local businesses are a popular way to enhance this process.

One exciting aspect of community referenced/based strategies is their direct tie to individualized critical skills approaches, or an ecological model, for students who experience severe disabilities. Ford and Davern (1989) described a program where students from fifth grade math groups rotated into the community to work on mastery of decimals through a specific shopping-pricing lesson, while the student who experienced disabilities worked on shopping and money-use skills. A wonderful community-referenced example from Peterson et al. (1992) described how teams of students from a physics class worked with a local bioengineering firm to develop adaptive equipment for their classmate. This leads to a discussion of one more support strategy, which is last but clearly not least! – that of utilizing peer support.

Peer Support

Villa and Thousand (1992) presented three categories of student collaboration strategies which synthesized exciting new perspectives on peer support: (1) students as instructional team members; (2) students as peer advocates, and (3) students as decision-makers. Throughout their examples and those from our survey respondents, there was a clear emphasis on natural support, capitalizing on peers' unique styles of problem-solving and instruction.

Reports from survey participants also covered a wide range of peer involvement. We categorized these as helper, teacher, model, advocate, and friend. Types of support mentioned are noted below:

- Helper
    - Support during transition times
    - Assist in completing work or tasks
    - Assist in transfers
    - Assist in eating
    - Assist in dressing
    - Assist in reading
- Teacher
    - Clarify teacher directions
    - Prompt informally
    - Peer and cross-age tutoring in school and community environments

- Model
  - Role model for appearance, behavior, communication, social skills, activity participation
  - Participate together in cooperative groups
  - Have a conversation/Use augmentative communication system with student
- Advocate
  - Set up social situations for learning
  - Report successes and challenges
  - Suggest ways to increase participation
  - Create adaptations
  - Participate in individual student's team and/or building level team
  - Challenge existing school structures and policies which restrict the participation of all students
  - Hold class meetings for group problem solving
- Friend
  - Accompany to extracurricular events, activities in community, at each other's homes, parties
  - Call on the phone
  - Participate in circle of support
  - Participate in futures planning group (e.g., MAPS, Individualized Planning Sessions)

Villa and Thousand (1992) provided a strong rationale for consideration of peers in collaborative roles with instructional staff: (1) all available resources are needed to address the diversity of our classrooms, and students are both cost-effective and exciting instructional resources; (2) current school restructuring efforts contain greater emphasis on student participation in their own learning and use of critical thinking skills, and collaborative peer models provide these opportunities; (3) it is important for all students to acquire an appreciation of diversity in learning styles and ability levels, in order to prepare them to be empathetic and contributing future leaders and neighbors; and (4) the provision of advocacy opportunities for students can promote citizenship behaviors, while arming students with the collaborative skills required of adults in today's world.

Finally, data collected in studies in four states, and summarized in a recent Minnesota IMPACT (Vandercook, York, Sharpe, Knight, Salisbury, Leroy, & Kozleski, 1991), indicated that general education students' achievement scores are not adversely affected by having students included in their classrooms, and concurrent measures of self-esteem show positive growth.

Examples of natural peer assistance, problem-solving, and advocacy abound. A parent we know frequently talks about the ways Anna's friends "enlightened" her, e.g., listing her six-year old daughter's chores and advocating for a weekly allowance; inviting her to sleepovers with no reluctance regarding her care needs, and their parents being comfortable with this as well; getting her on roller skates so she could "feel the wind in her face"; helping redecorate her room, which they thought too babyish; shopping and selecting purchases with her after she saved her allowance (Mintun, 1992).

Ayres et al. (1992) provided good examples of mutual benefit in their recent study group report. In a journal writing activity, a non-writing student dictated her entry to another who needed writing practice. In the case of Anna, whose peers were described above, these students assist with reading during silent sustained reading, thus improving their mastery while devising adaptations for Anna such as pointing to pictures on request, selecting a character, action or color in a picture, etc.

A final word is in order about support strategies in general. York, Giangreco, Vandercook, and MacDonald (1992) stated that "...the provision of real (as opposed to intended) support is contingent, in part, upon a mutual understanding of the outcomes sought as a result of the support" (p. 103). These authors contended that outcomes for support in inclusive classrooms should include successful learning and social experience for all students, and a feeling on educator's parts of being truly supported in their efforts to accomplish this.

Measuring Outcomes

How do we know that successful learning and social experiences are occurring for all students? What types of measurement are appropriate for and congruent with general education classroom practices? How are both individual and group outcomes measured in cooperative situations? These are critical questions for all educational settings today, given the influence data will have on our educational decisions at individual classroom and school levels.

All of the surveys we collected indicated that data are taken on learning progress. Data collection included such things as: narrative entries in a journal, report cards, anecdotal reports, accumulated work examples included in student portfolios, Individualized Critical Skill Model (ICSM) (Hollowach, 1989) assessments, feedback on instructional programs, self-monitoring programs completed by students, graphs/charts, 0-4 ratings on steps of a task, and pre/post measures. Most respondents mentioned that data collection is driven by the student's IEP goals and objectives.

Ford, Davern, and Schnorr (1992) reviewed some examples of innovative and meaningful assessment practices in general education, such as performance tests and student portfolios. Performance tests fit well with the cooperative, activity-based and multi-level approaches discussed in Chapter V, and provide for individualized as well as group measurement. These "tests" measure performance on a series of group tasks that have been completed over an extended period of time. Group problem generation, data collection and analyses, and reporting are components of this process. The final report might include products exhibited (maps, posters, structures built by the group), portfolios (compiled samples of each student's work over time), oral (debates, skits, plays) or written reports.

Portfolio or "authentic" assessment systems are also being piloted in several states, such as Vermont and California (Ford et al., 1992). The composition of portfolios is often both student and teacher determined, and the evaluation of this material is conducted using preset criteria which can examine many variables beyond typical measurement systems. Some of the performance tests examples above might be portfolio entries; other examples might include (1) samples of Anna's crayon drawings during 1st grade art which could demonstrate growth in color use as well as fine motor skills, (2) journal samples from language arts in Bill's second grade, which illustrate his expanding use of pictures, words and sequencing skills, (3) shopping lists composed by Mary during a junior high math class, which demonstrate money amounts needed and increases in basic addition and subtraction skills, and (4) communication/ conversation book samples with dated peer descriptions of the student's use of these during activities.

A primary issue for specific consideration in outcome data measurement or data collection is ensuring a fit between special education practices described in the IEP and the general education methods utilized. This does not mean that where written tests are the primary measure this must be the included student's system as well. Rather, it means that continuous as well as periodic data collection need to be relatively unobtrusive, and should utilize the staff present in the class, as well as peers as appropriate, to maximize efficiency and minimize the presence of "extra" adults, and thus ensure a real picture of student performance within the classroom milieu.

Meeting a Variety of Needs in a Typical Lesson

A. *Monthly Journal Summary*

At the end of each month in the Spring, Mrs. Finley's first grade class brainstorms all the special things they've done as a class during the month. Students work in their established cooperative groups for the initial brainstorming activity, since these small groups (four to five students) provide maximum opportunities for all students to contribute. Each group has a flip chart and either writes a key word on it to depict the activity, or draws a quick picture. Picture drawing is used if students are unable to spell specific words.

In the 10 minutes of cooperative brainstorming, students have specific roles, such as recording, underlining in color, facilitating, reporting, and keeping time. Staff, including Mrs. Finley, a special education paraprofessional and a bilingual paraprofessional, rotate among the groups to assist them with the task. This part of the activity includes several learning objectives for the students:

1) working cooperatively;
2) attending and listening;
3) memory;
4) brainstorming;
5) expressive language; and
6) turntaking.

B. *Group Sharing/Report & Journal Writing*

After ten minutes, each group's reporter takes a turn sharing their list with the whole class. Flip chart sheets are brought to the front and posted. As the reporter speaks, Mrs. Finley helps to augment the chart by underlining words or writing additional key words that she wants the class to learn. As these are printed on the board, each student writes the list in their personal journal, decorating the pages with the art project of the day, for example cutting out connected paper people. This activity includes a number of learning objectives for students:

1) copying from the board;
2) printing skills;

3) word recognition;
4) tracing around a template;
5) cutting out shapes;
6) pasting; and
7) coloring.

Students with a variety of abilities participate in the activity, requiring different levels of assistance. Instructional staff rotate among the groups to answer questions and offer assistance and advice.

Christian is a bright, engaging student who has little ability to move his body. He has an excellent memory and is a willing volunteer in brainstorming. He is the reporter for the group during sharing in this instance, and is also able to help others with spelling key activity words. His support in this writing activity includes the use of light, thick pens that allow him to hold the pens and provide the sensory input he needs in writing. They also produce a darker line than pencils, which for Christian do not mark darkly enough. A peer, David, opens the journal for him to write. On his wheelchair tray, Christian has self-opening scissors mounted that he can operate by pressing down and then releasing them. David holds and turns the paper for him to cut. He also turns the paper people over for him to spread the glue from a glue stick which has been opened for Christian. David then turns over the paper people allowing Christian to paste them down. David's involvement with Christian in this activity has helped to keep David focused and involved. He is a student who typically has difficulty with individual seat work, and has been considered "disruptive" in the past.

Jean uses a communication book and a few important signs to communicate. She is unable to identify alphabet letters or print. When this activity is scheduled, her teacher informs Jean's family who talks with her at home about what she's done in school that month. A symbol of one of the class activities is included in her communication book for that day and during the brainstorming, Jean is expected to point to the symbol. She is given the first opportunity to contribute in her group. The list from the board is written for her by a staff person, and a peer recites each activity as they write them. This provides her peer, Maria, who has limited English fluency, with extra practice in reading the words. Then, with the staff person holding the paper, and using double ring teacher scissors, Jean cuts with assistance around the shape. She puts paste on the back of the shape using her fingers and with Maria's assistance to place it, pastes the shape into her book.

Jennifer likes to be engaged in conversation. She has both vision and hearing disabilities and communicates through an interpreter. Before the brainstorming activity, her interpreter signs into her hand what the teacher is requesting. Jennifer is able to verbalize some of the activities of the month. Later, when students are writing in their journals, she dictates the list into a tape recorder and adds things she remembers from the activity to her list, embellishing the list auditorally rather than visually. Jennifer then plays her tape-recorded list for one of her peers in the group, Minh, who is just beginning to read English. As Jennifer's tape mentions a word, Minh looks for that word on her list. Minh then assists Jennifer while she cuts with scissors around a raised line made with dried white glue and pastes the paper people shape on the journal by feeling the edges of the book.

A number of support strategies have been utilized here, in a classroom with 30 pupils, three of whom experience specific disabilities. There is a great deal of diversity in the class, including students with high activity levels, and students who are beginning English-speakers. However, by utilizing cooperative groups, peer support, and integrated versus pull-out support staff, the activity becomes an exciting and meaningful learning experience for all involved.

V. STUDENT-SPECIFIC STRATEGIES

By: Tom Neary

Designing an Individualized Program

Inclusive education reflects the knowledge and skills gained through our experience in both general and special education. The practices which have proven to be valuable in general education in assisting students to acquire and utilize information and to problem solve, used in conjunction with those strategies demonstrated to be of value for students with special needs, provide a solid base for supporting learning for any student. As discussed in Chapter IV, whole language, thematic or experience based instruction and creative student interactive learning strategies, such as cooperative learning, offer exciting potential for all students because of the benefits of modeling and the relevance of learning in context. Cooperative learning in particular, offers a natural opportunity for participation at a variety of levels. Downing and Eichinger (1990) described cooperative strategies to facilitate participation of students with dual sensory impairments. Strategies commonly associated with special education, for example identifying learning styles, breaking activities and routines down into manageable parts, targeting discrete units of instruction, providing within stimulus and extra stimulus prompting, embedding critical motor, language, cognitive and social skills within functional activities and motivational techniques also offer a great deal of potential for general education, particularly in light of the increasing diversity of general education students discussed by Sailor (1991) and others.

As students with severe disabilities are served within general education environments, it is critical that the knowledge and practices of special education not simply be discarded as out of date. Our success in including students full time in general education who do not demonstrate typical readiness in terms of cognitive, language and/or social skills is due in large part to the skills of educators in finding potential in the core curriculum and classroom routine and adapting that curriculum to meet the needs of individual students. Inclusion means more than just being there for "social goals." Successful inclusion means that students' individual needs in language, motor, cognitive, social and life skills are addressed systematically within the most natural, integrated contexts.

In order to incorporate best educational practices in inclusive settings, a ***functional assessment or curriculum based assessment*** is essential. (Hollowach, 1989; Sailor & Guess, 1983). The basis of a functional assessment is the ecological inventory, a listing of the sequences of behaviors that reflect the actual skills necessary to participate in a variety of community environments (Falvey, 1989). The advantages in developing curriculum through this ecological strategy are multiple.

1) encourages life planning so that education is relevant
2) allows for individualized instruction
3) identifies present levels of performance to provide a means for measuring student progress
4) identifies potential adaptations in materials, rules, sequences and content
5) assists in identifying targets for instruction
6) provides information necessary to determine essential support
7) identifies areas of need and opportunity in basic motor, language, cognitive, social and activity performance areas
8) allows related service staff to gather relevant, contextual information regarding language, motor activity, learning style, vision and hearing use

9) maintains a reference to activities and instruction followed by chronologically age-appropriate peers

An Information Gathering Process

The initial step in a functional assessment is an information gathering process. Out of the vast universe of possibilities for instruction, what are the most important areas to address? What environments, activities and skills are critical to support full participation for an individual student?

School Site Inventory

One of the school sites we've had the opportunity to work with has a very simple site mission statement: "We believe that all students can learn and it is the responsibility of everyone in the school to make sure that happens."

While students are primarily assigned to classrooms, particularly at the elementary level, in fact, the entire school is a learning environment. Effective schools organize their direct classroom instruction and school resources in such a way as to support learning in all environments of the school. Ferguson and Jeanchild (1992), for example, list a number of school environments that offer potential for learning. Access to all curricular and extracurricular activities provides students with the opportunity to explore their interests, gifts and potential. One of our roles as educators is to be aware of all the opportunities a site has to offer, including classes offered (journalism, photography etc.), extracurricular activities (clubs, athletics, drama groups, scouts, chorus, band, Odyssey of the Mind etc.), special school events (Spring carnival, etc.) peer support programs and school communications (newsletters). While many of these activities have in the past been considered off limits to students with disabilities, changes in attitudes and expectations are inviting participation.

As a base for decision making about designing an individualized program, a thorough understanding of what the school has to offer is essential. This information is best gathered by talking with staff at the school site, attending club meetings, requesting ideas from other staff and examining school newsletters and bulletins as well as opening a dialogue with students and is typically gathered over time by staff who become intimately familiar with their school culture. For new teaching staff, it might be helpful to have a format to follow. An example format for inventorying a school site is included (Training & Resources for Curriculum & Community Integration, 1992) which identifies key information staff will need to ensure full utilization of the opportunities available. For example, one of the critical issues for students in secondary schools is the opportunity to pre-enroll in classes. Students with disabilities are often left out of this process and are forced take whatever is left in the fall. By understanding the enrollment process and promoting the expectation that all students have the opportunity to pre-enroll, students will be more likely to participate in motivating and interesting curriculum. The inventory process also provides information about natural peer support programs at a school site, for example, peer counseling, peer conflict resolution teams and peer tutor programs, that may be available and that can preclude establishing separate programs. One California high school integration support teacher at **Harbor High School in Santa Cruz Unified School District** described the opportunities a word processing class has provided for a student with multiple disabilities. While Carlos was originally involved in the class to develop conversational skills with a peer who was learning computer word processing, their relationship expanded to writing a collaborative column, "New Friends" for the school newspaper. They developed their interview questions in collaboration, Carlos asked the questions and his classmate took notes and typed the column. This type of opportunity is often lost when special education support staff are not familiar with all a school has to offer.

ENVIRONMENTAL INVENTORY - SCHOOL SITE

Training and Resources for Community and Curriculum Integration

Date September 1992

Site Trajan Elementary Inventoried by Jane Sanchez and Beth Williams

1. School demographics

A. Number of classes at each grade level

K-6 school; K-2 classes, K-1 combination class. !st grade- 3 classes; 2nd-3 classes; 3-4 combination class; 4th- 3 classes; 5th-6th family- first two hours mixed, then separate for specific subjects.

B. Class sizes

The limit is 32. Classes are presently held at 29. This is subject to change with budget issues.

C. Instructional assistants in general education classes?

Three School Improvement Program aides. No one class is assigned a general aide for the class. Aides are used as needed, such as for language arts in K-3.

D. Additional support staff/volunteers

There is no clerical support for the teachers. There are 1 1/2 Resource Specialists. There is an English as Second Language specialist part time. Three days a week, a speech therapist is available. Also available are a vision specialist and adaptive PE specialist part time. One PH and one CH specialist, school nurse, program specialist, physical and occupational therapist are available part time. Volunteers, parents, Teachers of Tomorrow participate.

2. General school schedule (include arrival, recess, class periods, lunch, dismissal, homeroom)

1st grade	8:10-1:45	4th grade	8:10-2:30
2nd grade	8:40-2:30	Recess	10:00-10:20
Recess	9:35-9:45	Lunch	12:10-12:50
	10:40-10:50		
	1:45-1:55	5th/6th	8:10-2:30
Lunch	11:15-11:55	Recess	10:20-10:40
		Lunch	11:40-12:30
3rd grade	8:10-1:45		
	8:40-2:30		
Recess	9:55-10:15		
Lunch	12:10-12:50		

TRCCI; 1992. California Dept. of Education.

3. **Organizational structure**

   A. Administrative structure (who is responsible for what?)
   Principal only-no vice principal. High degree of support and collaboration by the entire staff. Real sense of "family" from the school staff.

   B. Department meetings? When?
   Grade level at prep time. Each teacher from each grade level-one on study team, Wednesday before school; one on grade level team Thursday before school; one on grade level curriculum; one on school site council, 1X per month; faculty meeting 1st and 3rd Tuesday of month

   C. Faculty meetings? When?
   2:45-3:30 on the first and third Tuesday of each month.

   D. Staff duties (bus/lunch duty, etc.)
   Teachers have duty-free lunch. No bus duty in A.M. but duty in the P.M.

   E. Established school support teams (school governance, PTA, student study teams, school improvement plan, school site council)
   School Site Council once a month. Student Study Team.

4. **Peer support programs (peer tutoring, peer counseling)**
   Have had peer tutoring during lunch time last year. Lost room to Medical Therapy Unit at school. Would like to reinstate it. No peer counseling at present.

5. **School information methods (i.e., newsletters, bulletin boards, announcements)**
   Large sign on front of building. Can change letters, monthly. PTA newsletter. Grade level weekly newsletter. Bulletin board in office.

6. **Classes offered (secondary - i.e., journalism, photography, etc.)**
   None.

   Additional class activities offered (elementary)
   Have had GATE (Gifted and Talented Education) after school.

ENVIRONMENTAL INVENTORY - SCHOOL SITE *(CONT.)*

7. **Class registration/scheduling (procedure for enrollment, especially secondary)**
Typical forms-birth certificate, shot record, proof of residence.

8. **Extracurricular opportunities (i.e., clubs, athletics, drama, scouts, etc.)**
Choir (4-6th); soft ball; song and dance; talent show; drama; musicals.
$20.00 fee.

Procedures for enrollment
Anyone can enroll. Check with teacher.

Cost(s) involved
$20.00 fee.

9. **Special events (i.e., graduation, homecoming, assemblies, prom, fund-raisers, class trips)**
Awards assembly monthly; field trips by class-yearly at least.
Donation is $30.00-$40.00 a year. Fund raisers throughout the year.

10. **Opportunities for parent involvement (i.e., PTA school improvement team, etc.)**
Active PTA; school site council; volunteering.

11. **Safety issues**
Ramps and widened curbs for the wheelchairs. Traffic flow in the parking lot. Children need to walk their bikes.

12. **Special rules, considerations, expectations (student handbook, discipline policy)**
Discipline policy described in school manual. Teachers each use their own techniques, however, assesrtive discipline is described in the manual. Class buddy system with students going to other classes.

Family Interviews

Designing an individualized educational program demands a thorough understanding of the student's life, both within and outside the school. Educators who understand the environmental demands, resources and values of significant people in a student's life will be more likely to attend to important skills and able to ensure that instructional methodology utilized conforms best to that student's needs and style. Who better to provide this information than those people who spend the most time with her? Critical to a good working relationship between educator and parent is communication. Both parents and educators have expressed a strong belief in the value of pre- IEP conferences. Structured, open-ended interviews, for example the Individualized Critical Skills Model Family Interview process (Hollowach, 1989), and other ecological strategies, offer a method for gaining information about the student's present level of performance in life outside the school, student preferences, communication styles and friendships. They also allow families to express their hopes, dreams and values in a comfortable setting and encourage the development of individualized educational programs that meet student needs in inclusive settings. A case manager, typically the special education teacher or integration teacher and an additional team member if desired, meets with the family in the home or another comfortable environment to conduct an interview that focuses on family perspective and family needs through discussion of their child's daily schedule, basic communication, motor, social and cognitive skills being demonstrated and by asking for the family's hopes for the short and long term future. The role of the interviewer is to listen, gain an understanding of family values, resources and needs and develop a working relationship that will allow for honest and comprehensive planning throughout the school years. Planning in this manner also supports families in becoming better advocates for their children in working with the myriad of service providers who may be involved with a student.

Worksheets, developed for this purpose and utilized in California are provided (TRCCI, 1992). It is essential to recognize the importance of using an informal *interview* format in gathering this information. These worksheets are just that, they are not forms to be sent home or to simply fill out with parents. The interview is a dynamic process in which trust is built, information is gathered and ideas are generated to increase the student's participation as a valued member of his or her community. For further information on this process, see: Hollowach, K. (1989). Teaching that works: The Individual critical skills model. Sacramento, CA: California Department of Education.

Curriculum Matrices

Teachers in general education who have not had experience in providing instruction for students labeled severely disabled often believe that they do not have the skills to work with these students or that the general education environment does not offer what a particular student needs. Special education has reinforced these beliefs over the years by establishing separate but ostensibly equal learning environments and welcoming students with special needs with open arms. It has become obvious to many educators however, that special environments cannot offer the variety, stimulation or potential that general education environments can, particularly because variety, stimulation and new ideas come also from the thirty or so students in those classroom environments. Communication regarding individual student needs and the general education core curriculum and routine clarifies the potential of the regular classroom.

Many educators in inclusive schools utilize a matrixing process to communicate initially (Giangreco, Cloninger, & Iverson, 1992; Vermont Statewide Systems Change Support Project, 1991). This involves a discussion of current Individualized Educational Program (IEP) goals and objectives in the context of the classroom

ICSM

FAMILY INTERVIEW

Interview date 8/14/92

Student Rose

Birthdate 3/29/84

Address

Phone (Home) Phone (Work)

Directions to place of interview Rose's home- 80 E. to Russell Blvd. Go left on 8th St.; Right on Alta Dr. (3917 Alta Dr.)

Parent/Care provider's name Joe and Sharon

Other individuals to contact:

Name Shawna, Megan, Rebecca, Steven- friends; Alice and Bill- grandparents

Phone

Relation

Permission granted

Best time and day for contact

Phone

Best time and day(s) available for planning meetings Wednesday, 2-5:00

Local environments: Park across the street; school 3 blocks away Convenience store 2 blocks away

Medical considerations Recent onset of atonic seizures; side effects of medications- ataxia and lethargy

Equipment considerations Uses wheelchair, gait training walker, stander soon to be acquired

Additional services providers (Regional Center, CCS, etc.) Alta California Regional Center; Kaiser physical therapy(temp.); occupational therapy (Elks).

Revised 6/92 • Gorevin, Kanda, Meinders, Neary, Perlroth; Training and Resources for Community and Curriculum Integration (TRCCI). Calif. Dept. of Education.

WEEKDAY SCHEDULE

Student **Rose**

List information from the time the student gets up and goes to school until the time he/she arrives home from school and goes to bed.

MORNING ROUTINE

Student participation	Area to target	Family	Student
7:45 Getting up Tries to get up, needs lots of assistance from parents. Very unstable in the A.M. Parents get her to the bathroom quickly (dry all night!) Happy in the A.M. Medication may be affecting her waking up on her own. Must watch very closely due to the seizures.	Learn intervention method to inhibit onset of seizures.	X	
8:00 Getting dressed Rose chooses from outfits held up. She looks and reaches for one. Mom talks about clothing and Rose helps by putting her hands/arms up to help dress. Not able to help with pants-seems weaker with the medications, less muscle tone.	Increase Rose's participation in putting clothing on.	X	
8:30 (Non-school day-summer) Flexibility/movement Joe works with Rose on the rug-stretching, rolling, crawling. He feels the medications have affected her disposition-she tolerates things now, rather than enjoy them as before.	Teach school personnel how to do exercise routine.	X	
Eating breakfast Parents help her walk-different amount of help each day. Sits in the stroller to eat-this is a concern due to the slant of the seat. Regular chairs don't have sides. Appetite in the A.M. is good. She takes meds independently and eats independently (left hand). Sometimes puts cup down in plate or on side. Uses picture communication board-selects from choices. Reaches for the board when it is not available. Beginning to show some frustration when she can't have her choice.	Make communication board readily available at all times.	X	
8:30 To school Pushed to school in wheelchair-friends walk with her. Enjoys this trip, friends talk with her.	Pushing own chair.	X	
(Non-school day) 9:00 Activities with Marietta Playing piano, using communication board-trying to isolate finger, working on scales. Hand over hand, sometimes from wrist. Rose enjoys this. Exercises on floor(PT), doesn't seem to enjoy this.	Consider having her change channels, turn up sound. Work on facilitated commun.	X X	

WEEKDAY SCHEDULE

Student Rose

List information from the time the student gets up and goes to school until the time he/she arrives home from school and goes to bed.

MORNING ROUTINE

Student participation	Area to target	Family	Student
(Non-school day-summer) 10:00 Children's Day Park Three days a week. Rose is dropped off at the recreation program. Rose seems to enjoy this. Suggest talking to Kristin.	Take pictures of choices at CDP. Learn to use commuication board.	X	
Child Development Center Two days a week. Doing OK-sometimes too many kids there. Rose gets no extra help, there may be some resentment about this. She sometimes comes home wet.	Talk to staff about Rose's day.	X	

WEEKDAY SCHEDULE

Student **Rose**

List information from the time the student gets up and goes to school until the time he/she arrives home from school and goes to bed.

AFTERSCHOOL ROUTINE

Student participation	Area to target	Family	Student
(Non school day-summer) 1:00 Coming home/lunch Rose is a bit more groggy lately. She eats a light lunch. Sharon hands Rose dishes and wheels her to the table where Rose puts them down. Rose wants to sing during the lunch. Takes meds at lunch.			
(Non school day) 1:30 To bathroom Rose is often wet-she shows it on her face. Mom can tell her to hold it sometimes. Seizures are making it difficult. Parents help her wash her hands. Tries to grab the towel to dry hands. Afraid to let her near sink alone due to seizures. Not turning on faucet lately.	Indicating need to go to the bathroom.	X	
3:00 Nap Not able to get herself into bed lately. Wants mom to stay and sing- Rose initiates this by starting to hum.	Getting into bed by herself.	X	
4:30 Waking up/play Someone needs to wake her up-she's generally happy and refreshed. Parents help her out of bed. Rose will eventually sit up and try to get out of bed. Brady (dog) comes in and nuzzles her. Goes to bathroom (usually dry).	Can we get a teen ager to supervise kids instead of parents?	X	
Friends come over to play-read to her, play house, store, restaurant, Barbie. Rose plays the customer. Uses communication board with friends. Kids report to Sharon what Rose is doing. Sometimes swimming in the backyard or bike ride with the family. Rose loves these things. Kids are great finding ways for her to participate.	Use communication board to choose who she wants to play with.	X	
6:00 Swimming lessons (summer) Dropped off, program provides instructors. Friends go to watch. Not sure how she feels about it.			
7:30 Dinner Very hungry; parents have her help, hold things, use communication board to choose. Family talks about her day with her.	Communication board for choices, conversation	X	

WEEKDAY SCHEDULE *(CONT.)*

EVENING ROUTINE

Student participation	Area to target	Family	Student
8:00 **Family time** Rose likes to play with her dog, listen to music, watch a video, go to the park across the street or go out with her family. Sharon and Joe work on her use of the communication board and the computer. Friends are often over. She remains engaged with them and really enjoys their visits.	Play independently for longer stretches of time.	X	
9:00 To bed Helped to the bathroom, assisted to wash her face and hands and to brush her teeth. Lots of hand over hand support. Helps remove some of her clothing when parents start. Able to raise arms to put on pajamas. Helped into bed, likes a song. No problems sleeping.	How can we work with Rose on this now that her stability is so poor?	X	

WEEKEND ROUTINE

Student participation	Area to target	Family	Student
Activities Goes shopping with her family, friends. Rose in wheelchair. Parents and friends have her reach and hold items, make choices. Walks with someone at her side.	Find teenager to accompany Rose and friends instead of only her parents.	X	
Goes to family cabin at the lake.			
Out with other kids to park, events.			
	Needs to visit other kids in their homes instead of only in her home.	X	

BEHAVIORAL AND BASIC SKILLS INFORMATION

Student **Rose**

Activities student likes to do/does not like to do

Likes: music, singing, TV, rides in car, bike rides, slapstick, animated rhymes, sing song, piano scales, watching bubbles, candles, smoke
Doesn't like: taking clothes off, going to the bathroom

How does s/he let you know? *(If parent is providing information)*

Smiles, kicking feet, vocalizing.
Bites her hand, disinterest (sucks on hand, yawns).

Interaction student enjoys/does not enjoy

Wrestling, affection, talking to her dramatically, highs and lows of voice.
Enjoys most interaction.

How does s/he let you know?

Same as above.

Tell me about friendships/relationships. What are some of the things your child does with friends?

Friends over all the time-they play with her and advocate for her in and out of school. They swim together, bike, go to the store and other places. This has been a real joy for her family. Kids are very creative and stand up for Rose.

What are your dreams for your son/daughter?

Greater independence; communication system that goes beyond "needs"; more ways to contribute; achievement; unique role in life; controlled seizures; happy; solid support group.

Is there any additional information about your son/daughter that we haven't talked about regarding:

Communication (receptive/expressive) **This is critical! We all need to use her system consistently. We should use it receptively, too. Facilitated communication should be used-trying it at home now.**

Mobility **Stay close to Rose right now. When seizures are controlled, we'll get back to the walking.**

Toileting **Watch her face, ask her during the day if she needs to go. Singing is a real reward.**

Foods/drinks s/he likes or dislikes **Doesn't like sour juices or things too hot. She seems more finicky now. Doesn't like peanut butter and jelly, swallowing is more difficult now. Sometimes stops and holds food in her mouth, needs it taken out (since medication).**

Are there any behaviors of concern?

Appears more passive; less zest for life; less energy, excitement. Parents are certain this is due to medication side effects. Sometimes she hugs people she doesn't know. Mom doesn't like this. Drooling and putting things in her mouth are a problem.

TRCCI; 1992

BEHAVIORAL AND BASIC SKILLS INFORMATION *(CONT.)*

How do you deal with problem behaviors? **Hugging: Mom intervenes, encourages her to take their hand.**

Drooling/ hands in mouth: Tell her to take it out, "show me nice hands"; sometimes we don't stop her.

Describe the best way for your child to learn a new skill.
Hand over hand, repetition, trial after trial. Careful selection of target skills. *We need to find a way for Rose to get the repetition and drill she needs in an inclusive setting. Parents would like to see this happen a couple of times a day. (15 minutes?)

Describe your child's opportunities for decision/choicemaking
Meals; choice of activities; choice of clothing; choice of people to see; places to go; tapes to listen to (friends have taped their singing and have a picture of them on the cassette case).

List some of your child's strengths.
Perseveres; pleasant, easy to be around; draws people to her; charisimatic, attractive; curious; healthy; likes to learn; expressive; loving; surprising.

How does your child problem solve? Make decisions?
She's accepting of most situations. She may try to get away and move to something else-mobility is a real problem now. It's hard for her parents not to do everything for her now. If she's upset, she'll scream, cry or vocalize.

MEDICAL

Medications used Klonopin; .25 mg 1X per day; Depakote; 5X day

When 3 X day. 2 pills at each meal

Physician Dr. Morehead

Allergies None

Side effects of medication Reduced tone; lethargy; less alert; nausea; more sleep.

Impact on learning Sometimes falls asleep in class; not as mobile.

Other

What things that we haven't talked about yet are important to you or other family members?

BEHAVIORAL AND BASIC SKILLS INFORMATION *(CONT.)*

	Student	Parent
How do you feel about the school program?	Rose smiles and shows enthusiasm when arriving at school.	Great. Her teachers are doing a wonderful job and her friends are a real plus.
Types of support you would like?		Wish she didn't need so much physical support now. Administrative support. Knowing that her principal and whole staff understand supported education. Need more older students planning for her.
What are your preferences for:		
Extra-curricular activities?		Could use more opportunities for drama and music. More physical games, after school clubs.
Classes/subjects		
Activities	Likes music	
Clubs		
Jobs		More responsibilities, class jobs.

	Parent
How would you like to be involved in the school?	Would do music with children - 1X per week. Help out in class 1X per week. Sports events.
What is the best way for us to communicate?	Notebook; write each day-anything notable to talk about. Keep track of progress, problems, seizures.
What are some of the benefits you see as a result of the school program?	Friendships, network of support. Learning to communicate. Attention, listening, focusing on things.

TRCCI; 1992

FAMILY PREFERENCE FOR ACTIVITIES AND ENVIRONMENTS

Student Rose

Date 8/14/92

1. List the prefered activities (not basic skills) and environments for one, two or three years from now in each of the following areas.
   INTERVIEWER: Use your information from community inventory file and student's immediate neighborhood inventory to assist parents/care providers.
2. After completing the list, note if it is a student or family preference for each activity.

Domestic	S F Pref.	Recreation/Leisure	S F Pref.	School	S F Pref.	Community	S F Pref.	Vocational	S F Pref.
Open drawers to pick own clothing.	F	Turn on TV; Look at easy books independently.	F	PE activities out of chair	F	Take community recreation classes; gymnastics, horseback riding.	F	Vacuum; do dishes.	F
Get something to eat by herself.	F/S	Play games on the computer.	F	Learn classroom routines	F	Be part of something musical; weekly music or drama club.	F	Fold her own handkerchiefs.	F
Cook a simple meal Waffles? Hot dogs?	F	Ride a large trike; Do some kind of dance movement.	F	Engaged in typical academic activities	F	Go to a friend's home more often w/out parents.	F/S	Walk Brady the dog.	F
Open gifts at her parties; Cut her cake.	F	Play a short song on on the piano.	F	Daily computer activities	F	Be in girl scouts or church group.	F	Make her bed.	F
1145				Have- kids involved in planning for her.	F	Attend local musicals with friends.	F/S	1146	

TRCCI; 1992

INITIAL SUMMARY OF BASIC SKILLS AND CRITICAL ACTIVITIES[74]

Student Rose

Date 8/14/92

	PRIORITY 1, 2, 3, 4	HIGH PREFERENCE ACTIVITIES	BASIC SKILLS													
			Use commun. bd.	Make choices	Independent play	Inhibit seizures	Facilitated Communication	Get body moving	Indicate need for bathroom	Reduce hands in mouth	Discrimination in greeting behavior	Recognize letters/ words	Receptively label obj.			
DOMESTIC	3	Open drawers/choose clothing	X	X				X					X			
	1	Get something to eat-indep.		X				X		X						
	2	Cook simple meal	X	X						X			X			
	4	Open gifts/cut cake	X					X			X					
REC/ LEISURE	4	Turn on TV/Look at books	X	X	X							X	X			
	1	Computer games	X	X	X		X			X		X	X			
	3	Large trike/dance	X	X	X		X		X	X	X					
	2	Piano song	X		X					X						
SCHOOL	4	PE Activities out of chair		X				X			X					
	1	Learn class routines	X	X	X		X	X	X	X	X	X	X			
	3	Daily computer activity	X	X	X		X				X	X	X			
	2	Engage in academic activities	X	X			X	X		X	X	X	X			
COMMUNITY	3	Community recreation	X	X				X		X	X					
	2	Musical/ drama	X	X	X		X	X	X	X	X					
	1	Friends home w/out parents	X	X	X			X	X		X					
	4	Girl scouts/ church group	X	X	X			X	X		X					
VOCATIONAL	3	Vacuum/ do dishes	X					X		X						
	4	Fold own handkerchiefs	X					X		X						
	1	Make her bed	X					X		X						
	2	Walk Brady	X	X				X		X	X					

Revised 6/92 Gorevin, Kanda, Neary, Perroth; TRCCI. Calif. Dept. of Education.

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schedule. This informal meeting between the classroom teacher and the special education teacher or consultant provides time to clarify the desired outcomes for a particular student in cognitive, language, motor, social or self help skills; to ensure that the classroom teacher understands the expectations regarding achievement of core curriculum objectives and to gain insight from the classroom teacher about opportunities in classroom routine. An additional and equally important objective of this meeting is to acknowledge the classroom teacher's ability to generate ideas about how to meet student objectives. This is particularly important to encourage not only because the special education support person(s) will not always be available, but because the creative ideas of general educators need to be unleashed.

Examples of curriculum matrices are included below. Current objectives in abbreviated form from the most recent IEP are listed in the left column of the curriculum matrix. The classroom schedule is listed across the top. Each IEP objective is examined across each classroom activity listed to identify potential for being addressed in that activity/routine and to brainstorm creative ways to work on that objective at that time. It has become evident that acquisition of basic motor, cognitive, social and communicative skills is more easily accomplished when they are infused or imbedded within relevant, natural contexts. (Sailor, Goetz, Anderson, Hunt & Gee, 1988; York & Vandercook, 1991). For example, Anna needs to work on her mobility. Each movement to a new group or classroom environment provides the opportunity to practice this skill. Dylan's IEP specifies writing his name. He'll practice this during each paper and pencil task in his classroom, including journal writing and art projects. It's important that Stacey develop a sight word vocabulary and in examining her classroom schedule, three specific times were identified: during her morning handwriting time at 8:30, during the reading/language arts period at 10:00 and again during silent reading at 12:20. Neil's IEP specifies his use of visual and auditory cues. He'll work on these skills throughout the day and staff will be attuned to this need in the manner in which they provide instruction. A slightly different version of the matrix is provided for Rob, a high school student. Cooperating teachers using this matrix have identified some initial strategies for adapting curriculum.

This initial brainstorming is meant to generate ideas, not to fix curriculum. More information through the functional assessment process and through discussions in planning team meetings will further define which words the student will work on, how she'll practice these skills and what support she'll need. It's interesting to note that teachers involved in inclusive schools report that objectives change once students become more involved in their general education classrooms. Other skills become important to student success and educators as well as family members are able to see motivating events, routines and information that make more sense to focus on both programmatically and with an eye toward improvement in the student's quality of life.

IEP objectives that for one reason or another cannot be met through the typical classroom routine are noted. These may be addressed through a substitute curriculum (to be addressed below) or can be discussed again through the IEP and team planning process to determine whether they are still important.

The major purpose of this first discussion of curriculum is threefold: to gain an insight into the classroom routine, to ensure that individual needs are going to be systematically addressed and to encourage collaborative ideas from both general and special education teachers. This last purpose is critical in facilitating ownership of student success. (Thousand & Villa, 1989).

Functional Assessment

Assessment is not a static, once a year event, but rather a dynamic process that continues to generate new questions and new information. Our skills as educators

IEP OBJ./CLASSROOM SCHEDULE MATRIX

✓ = Opportunity to work on student's IEP objectives

Anna

First Grade 1990-91

Classroom Schedule

IEP Obj.	8:30-8:50 Opening; Flag; attend.; calendar.	8:50-9:45 Lang.; Reading; Phonics; Choice.	9:45-10:00 Recess; snack	10:00-10:15 Sharing	10:15-10:50 Math;manipulatives; Sorting; Classifying	10:50-11:30 Music; PE; Social studies	11:30-12:15 Lunch	12:15-12:35 Story	12:35-1:20 Lang.; Journal; Math; Brainstorming; Choice	1:20-1:30 Recess	1:30-2:15 Art; PE; Social studies
Walk independently	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Clap hands			✓		✓	✓				✓	✓
Part. w/peers in PE games			✓			✓	✓			✓	✓
Use name stamp independently		✓			✓	✓			✓		✓
Use crayon or paint approp.		✓			✓	✓			✓		✓
Complete 3 piece puzzle		✓			✓	✓			✓		✓
Follow multi-step routine	✓	✓	✓			✓	✓			✓	
Get in and out of wheelchair	✓		✓				✓			✓	✓
Up and down from floor indep.	✓	✓		✓	✓			✓	✓		
Use 5 new signs to communicate	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Say "Mom" to photo or mother	✓	✓			✓	✓			✓		✓
Choice using commun. board		✓	✓		✓	✓			✓	✓	
Turn taking with peer		✓	✓		✓	✓			✓	✓	✓
Circle of friends; initiate interaction		✓	✓		✓		✓		✓	✓	✓
Computer use-games;commun.		✓			✓				✓		✓

PEERS

IEP OBJ./CLASSROOM SCHEDULE MATRIX

✓ = Opportunity to work on student's IEP objectives

Stacey

Classroom Schedule

IEP Obj.	8:30-8:45- Roll; Handwriting	8:45-9:20 Math terminals	9:20-10:00 Recess	10:00-11:15 Reading; lang. arts	11:15-12:00 Lunch	12:00-12:20 Silent reading	12:20-12:50 Social sciences	12:50-1:00 Recess	1:00-1:50 Health	1:50-2:00 Recess	2;00-2:35 Music; PE or film
Join activity w/ other student		✓	✓	✓	✓		✓	✓	✓	✓	✓
Remain on task	✓	✓		✓		✓	✓		✓		✓
Begin task w/in 5 sec.	✓	✓		✓		✓	✓		✓		✓
Single digit addition		✓									
Rote count to 50		✓									
ID numbers to 50		✓									
Write dictated numbers to 50		✓									
ID coins		✓									
Read sight words	✓			✓		✓					
ID beginning consonants	✓			✓		✓					
ID character/ setting of story				✓		✓	✓		✓		
Dictate a sentence	✓			✓			✓		✓		
Write lower case letters	✓	✓		✓			✓		✓		

PEERS

IEP OBJ./CLASSROOM SCHEDULE MATRIX

✓ = Opportunity to work on student's IEP objectives

Classroom Schedule

Dylan IEP Obj.	8:35 Opening circle: calendar, song, surprise box, jobs	8:50 science/soc. studies; oral language	9:10 Journal writing	9:40 Recess	9:55 Story time on rug	10:15 Groups: Math, Science/ Soc.studes, P.E./art,Lang. arts/reading	12:00 Lunch	12:45 Silent Reading	1:00 Sharing, music, social studies, library, chorus	1:45 Recess	1:55 Math, problem solving, free choice, reading
Id letters of the alphabet		✓	✓			✓		✓	✓		✓
Id 5 sight words	✓	✓	✓			✓		✓	✓		✓
Count 5 items	✓	✓				✓			✓		✓
3 part patterning	✓	✓	✓			✓			✓		✓
Classification skills		✓			✓	✓			✓		
Uses computer											✓
Cuts shapes			✓			✓					
Writes name		✓	✓			✓			✓		✓
Increase verbal skills	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Raise hand for attention	✓	✓	✓		✓	✓		✓	✓		✓
Line up with class				✓			✓		✓	✓	✓
Independent toileting							✓			✓	
Refrain from taking other's things		✓	✓			✓		✓	✓		✓
Increase receptive skills	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
Build vocabulary	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

PEERS

IEP Obj./Classroom Schedule Matrix

✓ = Opportunity to work on student's IEP objectives

Neil

Classroom Schedule

IEP Obj.	8:30-8:40-Opening; Roll; lunch count.	8:40-9:05 Journal	9:05-9:40 Math stations	10:00-10:20 Whole group	10:20-11:15 Reading stations	11:15-12:00 Lunch	12:00-12:25 Spelling	12:25-12:50 Story/DEAR	1:00-1:50 Science OR	Plan/Do review	2:00-2:35; Drama; PE; Music; speech
Trace name; assignments		✓	✓		✓		✓		✓		
Dictates a comp. thought		✓		✓	✓				✓	✓	
ID character in story		✓		✓	✓			✓			✓
ID colors	✓		✓		✓			✓	✓	✓	
Read sight words		✓			✓		✓	✓			
Attend to visual cues	✓	✓	✓	✓	✓			✓	✓	✓	✓
Attend to auditory cues	✓	✓	✓	✓	✓			✓	✓	✓	✓
Follow 1 step direction	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Remain on task in group	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
Follow class rules	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
1:1 corresp. #'s 1-10			✓						✓		
Rote count 1-10	✓		✓								
Count sets of #'s to 10	✓		✓		✓						
Trace numbers			✓								
Recite days of the week	✓										

Integration Matrix* – High School

(Harbor High, Santa Cruz; Debbie Zehnder, Teacher)

		Period 1	Period 2	Period 3	Period 4	Period 5	Lunch	Period 6
	Name: Rob	*Science*	*P.E.*	*Work Experience*	*Work Experience*	*Library*	*Campus*	*Computers*
IEP Objectives	1. Use Intro-Talker to initiate conversations with ND peers	S	S	S	S	S	S	S
	2. Use self-monitor checklist	ML		ML	ML			ML
	3. Order from snack bar						S	
	4. Transition independently to next class/activity	S	S	S	S	S	S	S
	5. Use watch to be on time	S	S	S	S	S	S	S
	6. Recognize correct bus stop and route			S	S			
	7. Model voice level of peers	CO	CO	ML	ML	CO	S	CO
	8. Use Apple II printer							ML
Management Needs	1. Written behavior plan	✓	✓	✓	✓	✓	✓	✓
	2. Peer assistants in classes	✓	✓	✓	✓	✓	✓	✓
	3. Intro-Talker (updates overlays)	✓	✓	✓	✓	✓	✓	✓

S = Same *ML = Multi-level* *CO = Curric Overlap* *A = Alternative*

* Adapted from L. LaPlant, Vermont

improve with our increasing understanding of our students. Learning is also dynamic and exponential. As we learn new skills, the application of those skills opens up an ever expanding world, creating new challenges and new motivation. Each parent and educator we've talked with has expressed their surprise and delight at the way students in inclusive settings have exceeded expectations. This understanding validates the need to view assessment an ongoing process that is intertwined with instruction. As we teach, we learn.

The ecological, task analytic assessment strategies developed in special education over the years offer a method for examining classroom activities and routines and for generating a wide range of useful information. Viewing skills in context is also recognized as sound educational practice in general education as evidenced by whole language, thematic or unit based instruction. Students learn best from real activities (Glickman, 1991). In fact, asking anyone what they remember most fondly from their own educational experience will likely result in a response describing some form of experiential learning. There is an increasing interest in activity based instruction in general education in contrast to dydactic methods (Glickman, 1991). The application of real life experience as a basis for education has been a major force in education for students with severe disabilities for the past fifteen years and is one of the benefits of moving special educational services into the general education classroom. Community based instruction is valuable for all students. A number of educators are finding ways to involve students without identified special needs in functional, community-based instruction (Ford & Davern, 1989, 1992; Falvey, Coots, Bishop & Scheyer, 1989).

Assessment provides educators with information primarily about two things: what to teach and how to teach. Our assessment process should provide educators with information about how a student currently performs an activity, how he/she uses information, what modality is preferred or most useful, where in the activity or routine we need to facilitate learning, how we can adapt to allow participation and where we should focus our instructional resources, among other things. Assessment should make us excited about teaching a skill to a particular student because it should generate keys to learning for the individual student. The Classroom Activity Analysis Worksheet, provided below, organizes information gathered into five areas:

1) Classroom activity steps: a listing of generic activity or routine steps that any student takes in performing this activity. These should be discrete and small enough to allow a description of student performance on specific parts of the activity, but not so small as to make them counterproductive.
2) Student performance: a description of what the targeted student did at this point in the activity/routine describing whether or not the student responded to the natural cues, the physical performance on the step, any specific assistance that was necessary to support the student and any additional information that will help the team to determine how best to support the student in this activity.
3) Specific adaptations: ideas for how this activity step may be adapted to allow participation, for example, adapted materials, rule changes, providing physical assistance, focus on a different level of skill or changes in the environment.
4) Skills in need of instruction: identification of skills in this activity that the student should work on to increase his/her competence and independence, such as development of communication, motor or cognitive skills. Ideas about how these skills might best be taught are also helpful to the team and should be noted.

5) Comments/recommendations: additional information that might be helpful to a planning team is included here. This is the catch-all section of the tool and contains ideas for providing support, things to discuss with parents or others and suggestions for the team about how to ensure the student's success in the activity.

Functional assessment information is always gathered in natural settings, with natural cues and consequences available. The assessor's role is to observe how the student uses those natural cues and corrections, his/her physical performance of activity skills and how he/she may self correct. Information, in the form of prompts or corrections is provided only when the student is unable to move on in the activity and then only at the least intrusive level of prompt necessary. Our assessment process should not overlook natural support for individual performance. For example, do other students receive assistance from each other throughout the day? Does this natural assistance hinder a particular student from learning? The assessment worksheet provided below (Classroom Activity Analysis, Neary & Mintun, 1991), notes Anna's performance in a first grade circle time. Her participation in the activity includes raising her hand when her name is called in attendance. Peers who helped her appeared to assist too early, not allowing her the chance to do this independently. She was also pulled to standing. In examining her IEP objectives, getting up from the floor independently is a targeted objective. Observing in a functional context makes these discrepancies clear to us and allows for the discussion of strategies for Anna's skill development in this area.

In another example, Bob, who is enrolled in Personal Word Processing class, has a problem recognizing which file belongs to him as he obtains his materials for the day. He also has difficulty interacting successfully with others in the class. Teaching Bob to ask for assistance from peers or the teacher when he needs help can become a targeted goal for him in this class. Strategies to support his learning to identify his own materials also appear to be critical.

Related service providers, for example speech and language therapists, physical and occupational therapists, adapted P.E. specialists and psychologists have traditionally pulled students to separate environments to assess them in particular discipline areas. The validity of this practice, at least for much of the information derived, is in question. Performing certain language, motor or cognitive skills in a separate setting or not performing them in that setting does not always translate to the real, criterion environment. Information about these basic language, motor, cognitive and social skills is best attained in natural environments and activities. As students are being assessed in typical classroom and community activities and routines, related service providers should also be gathering relevant information at the same time. This transdisciplinary team approach, discussed by a number of educators (Campbell, 1987; MacDonald, 1991; Lyon & Lyon, 1980), serves to generate concrete strategies for improving performance in day to day, relevant routines. For example, if Anna is having trouble getting up and down, a physical therapist needs to provide expertise at this point in this activity. What is the best way for her to go from standing to sitting on the floor? Should she move to her knees first? Similarly, a speech and language specialist should be involved in creating her communication system for morning circle sharing.

The Classroom Activity Analysis worksheet is one format for generating useful information to organize instruction. It is meant to make us aware of the student's present performance and to be used as a decision worksheet to identify where and how we might adapt, where and how we might focus our instruction and where and how to support the student in this activity. Information and recommendations are then brought to the team planning meetings for discussion.

It is a common complaint that the paperwork portion of a functional assessment can be overwhelming or unwieldy, considering the number of activities a student is involved in, the day to day changes in routine, and the staff intensive nature of functional assessment. The critical factor in this type of assessment is that each support person involved in the student's program should be competent to gather information in this fashion on an ongoing basis. The worksheets included can be adapted to meet local needs. The functional assessment process is critical to meeting individual needs and is the difference in many cases between individualized instruction and just being there.

Critical Skills Summary

Periodically, new support people become involved in inclusive schools. Communicating the targeted objectives of students is important so that continuity in programs exist and so that as new activities emerge in the classroom, instructional personnel are able to stay focused on student needs. It is also helpful to communicate to others who wonder just what student needs are being met in this setting. Included is a Critical Skills Summary worksheet that outlines those important objectives for a student across the school day.

Curriculum Adaptation Strategies

Adapting to allow for participation has historically been a staple in special education historically. Adaptations in materials used, assistance provided, rules, activity sequences, as well as physical changes to the environment have enabled persons with specific cognitive, motor and language needs to participate in many aspects of school and community life. Viewing these adaptations beyond the scope of special education or outside the realm of only persons with disabilities has enabled service

Classroom Activity Analysis Worksheet

PEERS

☒ As is ☒ Physical Assist. ☒ Adapt Materials ☒ Multi-level ☒ Curriculum Overlap

Name Anna H.

Date May 24, 1991

Activity Morning Circle

Classroom activity steps	Student performance	Specific adaptations	Skills in need of instruction
Sit down on mat	Pulled down by peers; no chance to try independently	Allow more time	Standing to sitting; move to knees first
Listen to teacher	Focused on teacher, good attending		
Acknowledge name during attendance/lunch count	Assisted by peers to look, raise hand, sign Anna	Teacher cue to get ready; one peer to assist	Raise hand when name is called
Contribute to conversation	Attended; no opportunity to observe	Conversation book; teacher says, "Show us" and allows 20 sec for response before prompt	Shares information at least one time per week by holding conversation book or item up
Calendar	No opportunity to observe	Assist to place numbers; peer counts with her	Place date numbers, days on calendar
Stand for salute; salute flag;	Pulled to standing, no assist by Anna	Start early with cue	Stands independently; places hand over heart
Go to desk (by category)	No opportunity to observe, held by teacher	Peer to prompt regarding category	Walks independently; follows directions
Sit down	Needs assist to pull out chair	Chair out already	Sits independently; adjusts chair

Comments/Recommendations: Assign one peer for Anna per week versus two who change each day. Provide instruction to peers about overassistance and waiting to prompt until Anna gets a chance to try. Discuss with OT/PT re: standing to sitting/sitting to standing- what's the best strategy? Need to provide more time for responses- cue by support staff/peer prior to request or change of activity?

Neary/Mintun 1991

PEERS Project 1991

PEERS

Classroom Activity Analysis Worksheet

☐ As is ☐ Physical Assist. ☐ Adapt Materials ☒ Multi-level ☒ Curriculum Overlap

Name Bob

Date January 1992

Activity Computer class: Personal Word Processing

Classroom activity steps	Student performance	Specific adaptations	Skills in need of instruction
Arrives on time	Enters 2-5 minutes late Talks loudly as he enters	Coach prior to class Get pack ready	Control voice volume Walk slowly in room
Gets materials	Goes independently to file Talks loudly to self Gets other's files	Keep file in a separate place	Learn short phrases to ask for assistance (Hi!; How are you?; nod, smile) when passing.
Selects work area Begins program	Independently selects a computer table near peers; Tries to cram disk in Talks loudly Selects menu independently	Get peer to help w/disk Use phrase sheet Use "Keytalk" or easy word processor	Teach phrases to ask for help Hold disk correctly
Types program information	Types simple words; forgets (or is not motivated) to save material; Conitnues to talk loudly; gets frustrated at times	Use 3X5 cards; Type for short periods of time Peer prompt to relax Provide choices	Relaxation time (breathe, etc.) Observe what others are doing Take a break How to make choices
Prints work typed	Erases words when he is finished Knows "print" functions	Peer or staff help to print	Save material Give finished work to instructor

Comments/Recommendations: Develop self-monitoring sheet to reinforce steps and on-task behavior. Instruct peers to teach/remind when to relax, talk quietly. Teach peers conversation skill program. Assist instructor to collect finished work and return w/comments for reinforcement. Discuss w/parent to reinforce also. Give choices of materials to type and print.

PEERS Project 1991

Critical Skills Schedule

PEERS

Name ______________________________

Critical Skill Needs

Activities/Routines/Environments							
Language Arts	**Recess**	**Sharing**	**Math**	**P.E.**	**Lunch**	**SSR**	**Social Studies/ Science**
Use name stamp	Walk with Peers to playground	Looks at speaker	Uses name stamp	Makes choice of activity	Walks to lunch table	Touches pictures on request	Cuts and pastes
Transfer to chair	Signs “More”	Stands/holds item to share	Takes turns	Climbs on equipment	Asks for help when needed	Looks at book independently	Walks to center or group
Follow verbal directions	Makes choice of activity	Uses communication book	Uses math manipulatives	Signs “More”	Makes choices	Listens to tape with earphones	Transfers to chair
ID pictures in story	Climbs on equipment	Goes from sitting to standing	Uses computer	Holds rings	Wipes mouth	Listens & watches pages when being read to	Signs to communicate “more” or “finished”
Turns book pages		Uses conversation book	Responds to “Give me…”				
Signs to communicate “more” or “finished”							
Uses computer							
Uses crayons to apply to paper							

Adapted from McGrath, 1991

providers to expand their thinking about the many ways things can be accomplished. We all use adaptations in our lives, from the calculator we use to balance our checkbooks to our daytimers to keep track of our busy schedules and to compensate for our memory problems. As Owen White pointed out in "Adaptive Performance Objectives: Form Versus Function" (1980), what is important is the critical effect of a response, not the form of the response. One of our responsibilities as educators is to identify the critical effects or outcomes we want for our educational programs and then find ways for students with a wide range of abilities and interests to achieve those outcomes. Special education was originally conceived to allow for that individualization, not as an alternate place to learn an alternate curriculum. Adaptations support individuals in participating by providing the tools they need.

A number of ways to organize core curriculum appear to have emerged in integrated settings. (Falvey et. al, 1989; Ford et. al, 1992; York and Vandercook, 1991; Vermont Statewide Systems Change Project, 1991). Five categories for examining curriculum participation are presented here. There is naturally a great deal of overlap between categories. These are by no means the only ways to adapt curriculum, but offer a way to prompt thought. The first choice of course, is to examine the opportunities for participation with no changes at all. Many of the activities and routines in general education classrooms do not require any adaptation since they accommodate participation at a variety of levels as a matter of course.

As Is

Students are involved in the same lesson as other students with the same objectives and using the same materials.

- Matt works at the reading station with other students, listening to a tape of a book while following along in the book.

- Amy shares a favorite toy with her class during morning circle by showing it to her classmates and answering questions about it.
- Lorena takes snapshots on campus to help construct the candid photo pages for the school yearbook.

Providing Physical Assistance

Assisting a student to complete activities by the actual manipulation of materials, equipment or his/her body.

- Christian's friend, who sits in front of him, turns the pages of his book when he finishes a page and asks for help.
- Anna's friends assist her out to recess because she has trouble on uneven terrain.
- Sean's peer assistant reads his in-class, one page science assignment to him so that he can participate in the science experiment and discussion.
- Tim's literature exam is given verbally instead of in writing to check for his understanding. With this adaptation his inability to write does not affect his comprehension score.
- Jean has an in-class note taker.

Adapting Materials

Utilizing materials that allow for participation in age-appropriate activities without having pre-requisite basic motor, communicative or cognitive skills.

- Christian uses pens that are larger and lighter than typical pencils allowing for easier flow and compensating for fine motor deficits.
- Amy uses a calculator during "Mad Minute" math to allow her to compete.
- Amy checks other students math work with her calculator.
- Jon uses a name stamp to sign his work.

- Sandra uses manipulatives to practice her adding and subtracting rather than relying on paper/pencil calculations.

Multi-Level Curriculum

Students are working in the same subject area, but are working at different levels of curriculum.

- Jon works on 3 spelling words instead of the 10 per week his peers are responsible for.
- Brian organizes pictures instead of printed words into categories in the animal habitat lesson.
- Neil dictates his journal comments to his support staff or peer who prints them lightly in his journal for him to trace over.
- Aaron pastes letters on his worksheet instead of writing them.
- Tracy types the title and author on a card and draws a picture about the story, when other students are writing book reports.

Curriculum Overlapping

Students are involved in the same activity with other students but may have a goal from a different curriculum area.

- Anna works on her ambulation skills as she moves to her learning centers.
- Sam is responsible for locating his classroom, finding his chair and taking out his class materials during physical science class.
- Joan works on her ability to make choices during silent reading time by selecting a book to be read to her and letting her partner know when to turn the page.
- Matt works on his range of motion skills to turn on a tape recorder during math enrichment time.

Substitute Curriculum

Students are involved in alternative activities that meet primary instructional needs when the general education curriculum at that time does not. This is determined by the student planning team. Priority is given to involvement with peers in all alternative activities.

- Aaron collects attendance during the morning math lesson.
- Stacey works on her computer with reading games while her peers are taking the chapter test in science.
- Todd works at the hardware store in the afternoon to meet a critical IEP objective.
- Frances goes to the office to deliver materials, to work on releasing materials into the hands of clerical staff and to raise her head to greet the staff.

In examining practices across a number of inclusive schools, adaptations were developed in two ways:

1. those done "on the spot"
2. those that were planned and designed in anticipation of the student's needs.

While it would appear that each adaptation should be planned and discussed, it is not always possible to do this. Classroom content and routine may vary from day to day and the spontaneity of a general education classroom, while making education interesting, makes planning difficult at best. Those educators involved in inclusive schools need to demonstrate flexibility and competence in adapting curriculum. They also need to have a good understanding of the student's abilities and needs. Some special educators have noted that activities in general education classrooms change "at the drop of a hat" and make planned adaptation difficult. For many, this is a far cry from the highly structured schedule possible in special education classrooms. Most commonly, the adaptations have been made by the special education teacher/facilitator or the paraprofessional. In some situations, however, the general education teacher adapts curriculum. In fact, one general education teacher responding to our survey reported that her school individualizes math for all students, establishing learning stations across the school and across age levels. Students with special needs are able to work at a comfortable and challenging level as any student in the school. Many educators supporting students in inclusive classrooms reported that less time is required in adapting as general education teachers become more familiar with the student as the year goes on.

In addition to having skills in making on-the-spot adaptations in dynamic classrooms, instructional personnel may also need supplementary individualized materials and activities. When instructional personnel are clear on specific goals and objectives for individual students, and are well trained in the adaptation strategies noted above, determining how a student will participate in new activities is more easily accomplished.

Through cooperative groups, mapping (Forest & Lusthaus, 1989), or personal futures planning (O'Brien, 1987), peers have also identified ways to adapt curriculum, routines, etc. Many teachers report that peers assist other students within activities, particularly when the class is organized to encourage child to child interaction. The array of instructional support strategies, including peer support, have been discussed above.

Planned adaptations form the basis for students programs and are typically done in formal and informal student planning team meetings. The most common design for these meetings involves the general education teacher and the special education teacher/facilitator meeting to examine upcoming lesson and student participation. Related service staff are often included if they are available (or if their presence is necessary), and family members should always be invited. For some students, planning team membership is expanded to include the principal and one or more peers. While arranging meeting time to allow for participation by all key people involved with a student is difficult, it is an important factor in ensuring that student needs are being holistically addressed. Student planning team meetings provide the forum for a good discussion of how to adapt curriculum and how to monitor and evaluate what is occurring in the program.

The role of the planning team is to provide support to instructional staff through the development of instructional plans and support systems. Teams promote more efficient use of local resources and an increased understanding among general and special educators and families. Because planning teams meet regularly and frequently, individual student programs can be closely monitored to ensure success and to take advantage of new opportunities as they arise. Transitions to new classrooms and to new schools can be planned with steps outlined for a smooth transition. Meetings typically are short (30 minutes), task oriented (an agenda is prepared and an action plan developed during each meeting) and organized to be proactive (presentation of current status, brainstorming of solutions to any issues, ideas generated to increase participation). An excellent resource describing planning team meetings and providing planning meeting worksheets is the Vermont Statewide Systems Support Project's, Implementing Best Practices For All Students in Their Local School (1991).

As noted above, the nature of the interaction among those directly involved with a student is transdisciplinary. Hutchinson described this model in 1974, in which the various team members could learn from each other, expanding their roles (Hutchinson, 1974; Lyon & Lyon, 1980). This approach differs from both *multidisciplinary* models in which a number of professionals work independently and share observations and information and *interdisciplinary* models in which professionals and families work jointly, share information and make joint decisions, but maintain specific discipline roles. In a *transdisciplinary* model, not only do families and professionals work jointly in assessment, they also practice role release, sharing general information about their discipline and performance competencies. In this model, it is expected that all members of the team cross typical discipline lines to provide service. For example, the occupational therapist should also work on communication goals as they are involved with a student; the classroom teacher should address a student's use of his limbs as they focus on a particular learning activity. For many special educators, this role change will be difficult. Strict separation of discipline responsibility and practice is unfortunately still very common. One needs only to witness the extensive pull out programs in schools. Shifting into a support role, versus an expert role will create stress for many and will necessitate examining the common discipline myths (York et. al, 1992) so firmly entrenched. Those inclusive schools responding to our survey were clear in their belief that the role of support personnel is to support students in integrated settings and that any discipline boundaries have become far more flexible. Successful heterogeneous schools "expand the body of decision makers concerned with individual student, instructional, and organizational issues..." (Thousand & Villa, 1989).

One further point bears mention. In order for members of a planning team to be truly effective, skills in how to collaborate must be learned and practiced. Collaborative consultation is defined as "an interactive process that enables people with diverse expertise to generate creative solutions to mutually defined problems." (Rainforth et al., 1992). Collaboration is probably more easily defined than done. Teaching can be an isolating profession. Unless specifically planned, teachers have virtually no contact with other teachers except in the staff room, in teacher meetings or passing in the halls. As we work to "generate creative solutions to mutually defined problems," members of student planning teams will need to learn how to collaborate with each other. The skills demanded are similar to those teachers expect from their students in cooperative learning structures.

Some of the key characteristics of team members are:

a. to treat each other as individuals

b. to accept and appreciate differences in others

c. to be flexible, especially when faced with stress

d. to be active, participatory and productive

e. to be willing learners

f. to communicate in constructive ways

g. to be willing to share work, responsibilities, accolades and failures

h. to bring problem solving and collaborative values to the group

Data Gathering Procedures

Decisions about student progress are best made when information from a variety of sources is examined. Certainly the perceptions of family members, friends and educators about an individual's participation and ability are relevant. These perceptions are not sufficient, however to ensure that a student is gaining the most he can from his school program. Strategies for gathering more objective data are helpful in modifying the procedures we use in providing services. In surveying inclusive programs, all those responding indicated that some form of data is gathered. Some of the most common methods used are narrative entries in a journal, anecdotal reports, accumulated work examples (student portfolios), assessment worksheets, self-monitoring data sheets, charts and graphs, home-school communication and pre-post measurement. Data are collected anywhere from daily to a pre-post measure over a semester, but most commonly reported to be done at least weekly. One integration facilitator described data collection in this way:

> *The frequency of data collection is a function of the nature of the objective and the expected rate of acquisition. Data on regular curriculum content may follow the regular evaluation schedule (e.g. unit test every 3-6 weeks, weekly facts tests, and writing portfolios) or involve daily data collected by a special assistant (e.g. counts of class participation via augmentative communication system, spelling test scores, or length of time appropriately engaged in a whole-class activity).*

What is clear in observing inclusive programs is that data gathering procedures must be easily managed and unobtrusive. The massed trial instructional practice common in the past in teaching and tracking discrete skills does not easily transfer to general education settings. For one thing, the learning environment cannot be controlled to allow for such a clean approach to providing prompts and corrections and for another, undue attention is called with some forms of instruction and data collection.

What is suggested is a clear definition of the specific objectives in each routine or classroom activity, a written description of instructional procedures to be followed for targeted skills, and easily managed data sheets to note student performance to be available to each person responsible for the student's program. Documentation can be made after activities, either immediately following an activity or at the end of the day if recall is not a problem. What is critical is whether the information gathered is used to make decisions. Data collected should be the basis for discussions in the planning team meetings about adjustments to a student's program. An example of an instructional program/data collection instrument developed by Carolyn MacMillan and Morgen Alwell for a student at John Muir School in Berkeley, California follows page 99. Its convenient size and format are especially helpful. It should be noted that the "instructor" could be one of Jonathan's peers, or that a peer could assist with program generalization opportunities.

Supportive Planning Strategies

An emerging practice in planning for individual students involves expanding the members who offer input. Successful inclusion implies membership, natural support and the understanding of the interdependence of people in communities. The practices of the seventies and early eighties in terms of community based education demonstrated the importance of focusing on quality of life for individuals through identification of a criteria of ultimate functioning (Brown et al., 1976). The scope of education expanded into those areas which would enable participation in all aspects of life, for example involvement in natural, integrated recreational and social situations.

It became obvious that identifying these environments and activities was not something that educators could do using a curriculum guide or formal assessment tool, but that it required asking significant people in the student's life to define what was really important. This letting go of the sole responsibility for having all the answers has been a relief for special educators, but also in some ways difficult. Professional judgment is not the defining factor in developing a student's educational program. The information and ideas generated by families, friends and community members are critical to success in the variety of heterogeneous environments and activities in which an individual is and will be involved.

As described above, the family interview is one of the best ways to obtain relevant information about what is critical for a student to learn. Two additional strategies, MAPS and Personal Futures Planning, also provide a means for generating meaningful information with people who are in the best position to help make decisions about what a person needs to learn. Both start from the perspective that each individual is unique and brings interests and gifts to the community.

Alwell & MacMillan (1992).

JOHNATHAN'S PICTURE SCHEDULE PROGRAM

LONG RANGE EDUCATIONAL GOAL: Johnathan will independently use a Picture Schedule Book as an aid to inform him of his daily activities.

SHORT TERM INSTRUCTIONAL OBJECTIVE: After directed to his desk, and before morning classroom activities have begun, Johnathan, given a verbal request, will open his Picture Schedule Book, choose 1 of 2 pictures, as verbally requested by instructor (from 2 pictures), push same picture (already positioned 1/2 way into photo holder by instructor) completely in the picture holder. Student will push open Schedule Book up to top,left hand corner of desk to within 1 inch of the edge. upon completion of each pictured activity and being presented with Schedule Book, Johnathan will point to requested picture and following instructor's request, Johnathan will remove picture (removed 1/2 way by instructor) completely from photo holder and give to instructor. 8/10 opportunities with 80% accuracy.

JOHNATHAN'S PICTURE SCHEDULE PROGRAM

TASK ANALYSIS	PROMPT	DON'T REINFORCE CORRECTION	R+	Date				
1. Sits at desk	DV	G-FP	Praise	+	+	+	+	+
2. opens schedule book	DV-I/DV	G-FP (on hand)	Rub shoulder	+	+	+	+	+
3. Points to picture	DV	G-FP (on hand)	Praise	6/-				+
4. Pushes picture into photo holder	G(point to picture)	DV-FP (on hand)	Praise	9/+	9/+	10/+	+	+
5. Puts book at top of desk	DV	G-FP (on hand)	Rub shoulder	+				
6. Points to picture	DV	G-FP (on hand)	Praise					
7. Pulls out picture	G(point to picture)	DV-FP (on hand)	Rub shoulder					
8. Hands picture to instructure	G (Hold out palm)	DV-FP (on hand)	Thank you					
9. Closes schedule book	DV	G-FP (on hand)	Rub shoulder					
10. Puts book on desk	G(point to picture)	DV-FP (on hand)	Slap 5					
			# correct / #oppor.	8/10	7/10	10/10	9/10	
			%	80	70	100	90	
			Instruct.					

INSTRUCTIONAL PROCEDURE

SETTING Room 8, Johnathan's classroom, to occur during class time once at the beginning of the school day. Nothing else on desk.

MATERIALS: Johnathan's Daily Schedule, Picture Schedule Book, box of pictures containing his daily activities., data sheet, pencil.

PROCEDURES:
-Forward Concurrent Chain
-Sd for beginning program:
  Requesting that Johnathan sit in his chair at his desk.
  Sd for change of activity picture:
  Placing the Picture Schedule Book in front of Johnathan.
-Steps 3, 4, 6, 7, and 8 recycled for a number of trials with in each session.
-Prompt fade strategy (see second sheet).
- Responses to occur within approximately 3 seconds of prompt.
- Correction (see second sheet).
- Criterion for Movement: Fade after 6/6 opportunities correct for each step.
- Reinforcement-use rubbing shoulder, verbal praise and slap 5.
-Johnathan is to be instructed in the use of his Picture Schedule every school day.

MEASUREMENT:
-Score + for anticipated correct response
- Score + for correct at current prompt level
- Score - for incorrect or no response at current prompt level

On steps 3, 4, 6, 7 and 8 if student performs skill 8/10 at current prompt level score a "+". If student scores less than 8/10 at current prompt level score a "-". Mark correct number in corner of task analysis square.

Collect data twice a week. Count number correct. Graph.

GENERALIZATION STRATEGIES: Johnathan to use same picture scanning skills in Conversation Book Program

NEXT OBJECTIVE: Same objective as above, placing photos 1/4 of the way "in' or "out" when placing in or removing.

MAPS (McGill Action Planning System, Forest & Lusthaus, 1989; 1990), is a planning process designed to assist those people intimately involved with a student to create a truly individualized support system. Unlike some planning processes that focus on identifying and remediating student deficits, MAPS builds an understanding of who the individual is from the perspective of those who know her best. By addressing an individual's strengths, gifts, talents and the dreams and nightmares people have for that person, team members can be sure they are really focused on what the student needs to be a valued, participating member of an interesting world.

As described by Forest and Lusthaus (1990), team members (which include family, friends, and educators), begin by talking about the student's history, providing important information to establish a better understanding of this person. Each member of the group is asked to say what their dream for the student is; the future they would like to see for this person, and not simply what they think is possible. Nightmares, those things people are afraid might happen, are also shared, so that each person on the team can express what they are worried about and take steps to assure that these nightmares won't be realized. The team shares words that describe who the student is and what his/her strengths, gifts and interests are, allowing a picture to emerge of the uniqueness of this person. This sharing process develops a sense of community around one individual, a shared understanding to use as a base for determining what the individual's needs are and how they can be met. It also establishes a sense of responsibility for this person's success. Through the MAPS process team members define an ideal day for the person, citing responsibility for each team member for supporting that ideal day. This sense of responsibility is critical in transcending the limits of the service system, which by its nature tends to view and serve individuals as part of a group. It recognizes the informal resource systems that are available and underutilized (O'Brien, 1987).

Personal Futures Planning is a similar process that encourages friends, family and community members to design a desirable future for an individual. Like the MAPS process, members generate information around five basic questions designed to establish the current lifestyle of the individual and then focus on a plan to support a desirable lifestyle. A complete sample for each of these processes appears on the following pages, with thanks to Debbie Tweit, Mary Ellen Sousa, and the Brooks family. Additional information on the processes themselves follows Mike's Map (Tweit & Sousa, 1990).

Five quality of life areas based upon the work of O'Brien (1987) and described by Diane Browder (1991) are:

a. Community presence- the individual's participation in the community environments available to anyone.

b. Choice- the individual's opportunity to make decisions in their life about things that affect them. Choice is critical in gaining and maintaining some control in life.

c. Competence- the ability to care for one's self and to participate in meaningful activities.

d. Respect- having a valued place in the community; being seen as important to the community.

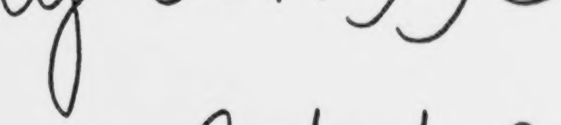
e. Community participation- refers to social relationships, friendships with people who are not immediate family.

As team members share around these key elements, they build a personal future through seven basic steps:

1. develop a personal profile of the focal person, emphasizing strengths and capacities;

Notes from Mike's Meeting

May 30, 1990



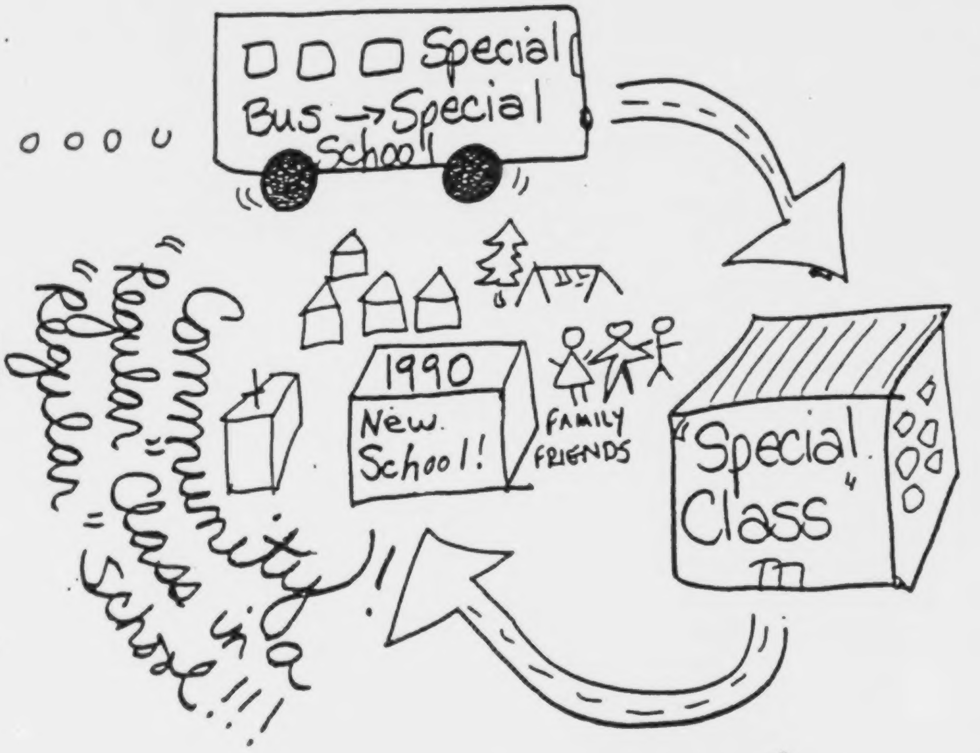
Content By: Mike's Friends, Parents, Teachers... with agreement from Mike

Recorded By: Mary S.M.

Tweit & Sousa (1990)

Mike's Map...

his story...


Special Bus → Special School!
"Special Class"
1990 New School!
FAMILY FRIENDS
Community, a "Regular" Class in a "Regular" School!!!

Changes for Mike, Changes since his arrival:

...people are nicer to each other; he knows how to
"ignore" us now!; he can drop-kick a ball; he knows
what he can do now; he makes it easier for people to
be nicer to each other; he doesn't interupt class anymore
...very much; we don't need to "pick buddies" for Mike no.
he can do it himself!; he has more friends. says whole sentences!

dreams we have for, and with, Mike!

. . . to grow up with his friends

. . . to learn how to read

. . . to have friends (lots)

. . . to have a job someday and make $

. . . to be a "regular guy"

. . . to have confidence and be happy

. . . to travel thru school and beyond!

. . . to go to college, be a successful businessman & make lots of $!

. . . to have opportunitie to help people, teach people

Yes, we have even More Dreams.

...to have a nice house, get married and be as independent as he can

...to be a professional athlete (run? baseball?)

...to have lots of friends who don't make a big deal out of his difference.

...to not have to take his medicine anymore

...to keep going thru school with his friends

Nightmares

scary stuff we DON'T want to happen!

... friends who "drop" him

... being forced to stay in Gr. 4 (when friends go to Gr. 5)

... people hurting Mike's feelings, leaving him out

... being alone, homeless

... bad teachers

... getting hit by a car

... people treating him "different"

... people rejecting Mike

... having to take medication forever

... forcing Mike to go back to his old school

... getting lost — people not understanding that he might need help

... becoming isolated

... riding motorcycles

WHO IS Mike?

... likes people ... is smart ... likes purple ... is cool ... is fun ... friendly ... likes burritos ... likes kids ... has a loving heart ... funny ... cute ... likes to run ... enjoys movies and recess ... likes us and our class! ... confident ... is fun to make jokes with ... observant ... a guy who likes his Mom and Dad ... likes to smile ... caring ... talkative ... likes hugs ... fun ... loves the turtle and playing with his hands. loves all animals ... likes music and singing ... loves being "twirled around"! ... likes a school where they teach him good thing

Things Mike Needs:

- To be with his friends
- Teachers who love him
- Continue to go to his neighborhood school
- Make new/more friends
- Stay safe in the street
- Go to "regular" summer school
- The opportunity to make choices and help making them
- To learn new things
- "Someone exactly like Mrs. C
- To feel comfortable, active, busy, included
- To continue learning how to express himself
- Continue learning how to walk safely
- Do what other kids are doing
- For people not to make fun of hi
- The understanding/support of frier

Action Plan

1. Mike goes to grade 5!!
2. Hold an I.E.P. meeting to plan the "specifics"
3. Have a class meeting in September so Mike can meet all the new kids
4. Start planning for middle school (during next year).

Final Thoughts...

Mike has had an impact on this class... he's come a long way... it's different, better with Mike here... kids do it best! ...Mike is going to make it because of all of "us"... we're thankful to be friends... people should look at people's "insides" first.

2. review issues and trends in the surrounding environment that are likely to influence the quality of the focal person's life;
3. create desirable goals for the future, including vocational and residential options within the community;
4. identify obstacles and opportunities within the general community;
5. identify implementation strategies related to the desired outcomes;
6. establish priorities for implementation;
7. identify additional issues that may restrict community participation. (Malette, Mirenda, Kandborg, Jones, Bunz, & Rogow, 1992).

Through this process, relevant objectives can be identified and equally important, the necessary support to reach a desired future. For example, in building a personal future for Amy, a 21 year old woman, friends, relatives and service providers brainstormed what works for Amy and what doesn't, and her capacities, gifts and interests, in order to generate ideas for living and working situations. They also identified the assistance she would need to be successful. When interested people are part of meaningful planning for a friend or family member, they are more likely to participate in supporting that plan.

For children, whose primary environment during the day is the school, the school is the community to consider. It is critical, however, to examine participation across all environments, not only the school.

Team meetings, by their nature are dynamic processes. They are meant to generate new information, new understandings, to clarify issues, to share problems and successes and to identify strategies for supporting students. Effective team meetings are outcomes-oriented and efficient in their use of time and resources. Establishing certain critical roles is an important first step. The facilitator provides direction to the group, keeping things moving, clarifying comments if necessary, checking for understanding, making sure all members contribute. The recorder is also a key role, creating a written record of the meeting to encourage thoughts and ideas and to assure that people's contributions are not lost. Creative recording strategies that combine visual illustrations and written information are very helpful in stimulating discussion. Information on the use of these type of strategies can be found in Mount & Zwernick's (1988), It's never too early, it's never too late: A booklet about personal futures planning.

The success of educational services has been evaluated in a number of different ways. One common theme is outcomes. What impact are our services having on the life of this person? It would seen that at least one critical measure of outcomes has to be the involvement of non-paid people, friends, and acquaintances in the lives of our students. When students have been separated, it may be necessary to invite others to participate. Support planning strategies such as MAPS and Personal Futures Planning are common sense approaches to community involvement.

Date: 5-21-92

Profile for:

AMY

People who helped make this profile:

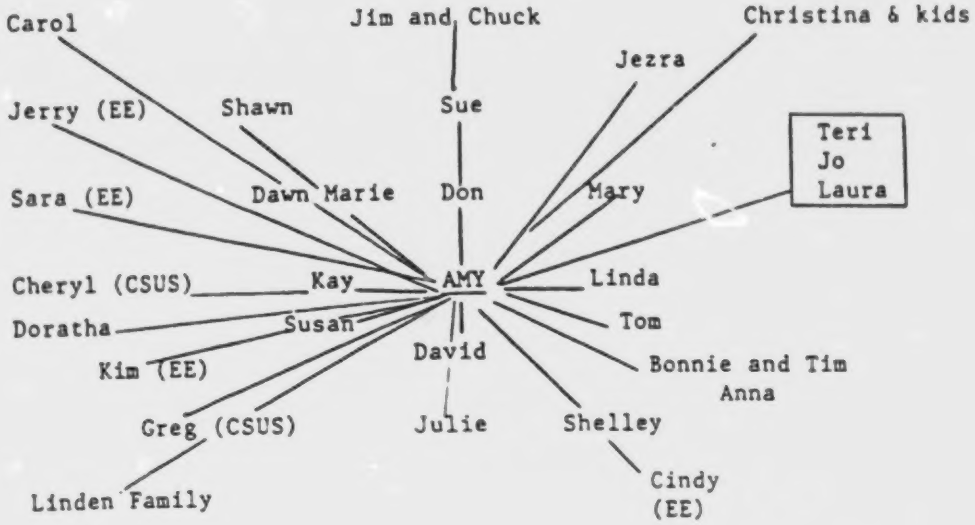
Amy	Tom
Don	David
Linda	Shelley
Cindy	Mary
Kim	Dawn Marie
	Carol

People's comments on making or reviewing the profile:

Personal History

Amy is a 22 year old woman with brown hair and blue eyes. She currently resides in her own home with 3 other roommates. Amy was born in the Sacramento area and resided with her family until the age of 16. She participated in special educational programs throughout her educational career. At the age of 16, Amy moved to a 14-bed ICF/DD-H facility. This placement was selected because of their ability to deal with Amy's seizure disorder that continues to be uncontrolled to this date. Amy's peers in that facility did not have adequate verbal skills to communicate with her, nor did they share many of her interests. As a result of her frustration, she displayed a variety of behavioral challenges and was requested to move from the facility. Following this request, Amy resided in a number of community residential placements, primarily 6-bed facilities. Each of these placements was unsuccessful due to the complexity of managing Amy's seizure disorder and behavioral challenges. After a brief stay in each of these homes, Amy was asked to leave. Following each move, Amy became more difficult to manage as she became frustrated at her lack of success. She returned to her family home in 1990. Following an unsuccessful statewide search for an appropriate existing program that could assist Amy in residing out of her parents' home, a circle of support was developed. This circle began assisting Amy in planning for a move to her own home. Amy moved into a 4-bedroom house in July, 1991. She currently resides with two paid roommates, one of whom has been with her since July, 1991, and a fourth roommate that is a client of the regional center. Because of the frustration Amy experienced in her licensed board and care facility placements, Amy still expresses a great deal of insecurity about her present living arrangements. Many of the behavioral challenges that existed in her previous placements continue to this day; however, the intensity and frequency of her outbursts have decreased significantly. Her roommates have developed a variety of strategies for assisting Amy to get through difficult days prior to her seizure activity. Amy indicated that a highlight during her life was that she had two goldfish named Sam and Peanut Butter. She won them at a school carnival and took care of them by feeding them every day.

Relationships Map


Carol
Jim and Chuck
Christina & kids
Jezra
Jerry (EE)
Shawn
Sue
Teri
Jo
Laura
Sara (EE)
Dawn
Marie
Don
Mary
Cheryl (CSUS)
Kay
AMY
Linda
Doratha
Susan
Tom
Kim (EE)
David
Bonnie and Tim
Anna
Greg (CSUS)
Julie
Shelley
Linden Family
Cindy
(EE)

Barriers to strengthening the person's network of relationships:

Unpredictable behaviors.
Limited ability to use public transportation.
Limited access to recreational and social opportunity in the community.
Difficulty managing behaviors prior to seizure activity.
Uncontrolled seizures.
Lack of telephone skills.
Sometimes wants to be left alone.
Dependent on others for care and supervision.

Ideas for renewing and strengthening existing relationships and forming new ones.

Places Map

Sacramento State

AAA

ARC aerobics class
or
ARC walking track

North Highlands Community Center (volunteer work for senior lunch)

Community activities

Purchasing lunch

Burger King, McDonald's, Pioneer Chicken

Purchasing healthy snack

Lucky's

Albertson's

Regional Transit and light rail

Family home

La Bou

Raley's

Various malls

Parks

Baker Ben's Donuts

Pet store

Barriers to sharing more community places and activities:

Unpredictable behaviors.
Limited ability to use public transportation.
Limited access to recreational and social opportunity in the community.
Difficulty managing behaviors prior to seizure activity.
Uncontrolled seizures.
Lack of telephone skills.
Sometimes wants to be left alone. Dependent on others for care and supervision.

Ideas for increasing the community places and activities the person shares with other people

Beauty salons
Shopping
Free concerts
Country rock
Zoo and parks
Swimming

Bowling
Yogurt restaurants
Coffee outings
Tower Records/Tapes
Out for pizza
Carnival/amusement parks

Roseville Auction
Marineworld
American River (lunch on a bea
Old Sacramento (riverboat or t
ride)
Jazz Festival/Blues Festival

Continued from "Ideas for Increasing the community places and activities the person shares with other people":

Ferry to Alcatraz
Trip to San Francisco
Boxing
Wrestling
College clubs
Volunteers from colleges
Church activities
YMCA/YWCA
Parks & Recreation activities

What works for the person	What doesn't work for the person
Giving Amy control. Teasing Good sense of humor. Talking Spontaneity Variety Routine with options. Happy people around her. Time and space to regroup (time-out) Incentives. Reasons for requests/Explanations	Grumpy people around her. Power struggles Rushing Repeated requests during stressful periods. Seizures.

Barriers to offering the person more of "What Works"?

Ideas for offering the person more of "What Works"?

Capacities, Gifts, and Interests

Great paper-shredder.
Great sense of humor.
Good memory
Perseveres
Likes music, dancing and singing (Southern music and Oldies, and Rock-N-Roll (Chuck Berry).
Likes to go places (out to eat, out for coffee).
Shelley likes her because she is good at games.
Likes having her toenails and fingernails painted.
Matches clothes.
Enjoys jewelry and dressing up.
Enjoys folding laundry.
Likes cooking.
Good at puzzles.
Enjoys going to the park.
Car rides.
Swinging
Enjoys cleaning out cars.
Likes making money.
Brings joy.
Makes other people act silly.
Reminds everyone they are human.
Inspires creativity.
Likes to meet people (in high places).
Good P.R.
Can make small purchases.
Knows how to wait for change.

Barriers to discovering or expressing capacities, gifts, and interests?

Seizures
Wants to make decisions but can't read.
Doesn't always express desires.
Gets frustrated.

Community people, places, & asssociations the person might share interests with?

Note: Be careful of generality. Some people's interests, gifts, and capacities are hidden; so focus on this aspect of the person's life will make a big difference. Don't cover over a lack of knowledge of capacities with vagueness.

Necessary Assistance

Support to health and well being:

Seizure disorder: Sees Dr. Gabor of UCD Med. Center. Takes a variety of seizure medications. Wears protective headgear.

Has paid roommates to provide supervision during all waking hours.
Receives regular blood levels.
Immunizations are up-to-date.

Assistance to deal with practical aspects of disability:

Supervision must be provided in all activities.
Wears protective headgear.
Medication for seizure activity.

Assistance with learning:

Receives services of Sacramento County Office of Education, as well as services of Employment Enterprises.

Assistance to deal with the threat of poverty:

Amy receives SSI.

	Own choices	Choices made by person with support	Choices made by others
Think about Daily activities Routine scheduling Money matters Major Choices: Where to live Who to live with Where to work	Chooses what she wears the next day; Timelines; What she wants to do after work; Dinner; Breakfast; Music; Activites for home and leisure; Videos; Bedtime; Weekend get-up time; Private time; Stop and take a rest.	Go places outside the house; Activities outside the house; Purchasing clothing; Personal item; Where to live; Who to live with.	Amount of food she eats; Medical.

What back-up does the person have if bad choices get made?

What help does the person get to become more autonomous and responsible?

Images of a Desirable Personal Future

Improved phone skills.
Paid job with flexible employer, flexible timelines and independence (not a shared job).
Big paycheck.
Paper shredding job (possibly Corporate Tower Records, West Sacto.)
Good benefits.
Increased responsibility around the house.
Increased community access.
Better seizure control.
Shopping for own clothes.
Packing own lunch.
Work mat on floor and kitchen.
Occupational therapy assistance.
Increased exercise opportunities.
Increased recreational opportunities (in and out of home).

What are the biggest barriers to moving toward this future?

Helmet

What opportunities are there to move toward this future?

VI. CLOSING

This manual has been a collaborative effort to bring together information from a variety of sources, including the California and Colorado Systems Change Projects and their work with a variety of teachers, parents, schools, and districts; the California Research Institute on the Integration of Students with Severe Disabilities at San Francisco State University; teachers and administrators nationwide who graciously responded to our surveys with thoroughness and enthusiasm, and the current literature in the field on effective, inclusive practices. We acknowledge that this is an initial effort in this area. A great deal of work remains to be done in refining and evaluating our experiences with inclusive education, and in sharing these successful practices with the full education community.

We hope that readers will accept this challenge and continue to work toward inclusive education of all students. As noted in the Introduction, inclusive education is now viewed nationwide as a critical component of the overall general education reform agenda (cf., Sailor, Gee, & Karasoff, in press). We must bring this awareness to our local schools and communities, and work collaboratively to restructure education for the benefit of all students. We have been presented with an exciting, dynamic challenge. We hope that you will be active participants in this change process, and that your students will be direct beneficiaries of its outcomes.

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APPENDIX A

National Full Inclusion Site Network

CALIFORNIA RESEARCH INSTITUTE
ON THE INTEGRATION OF STUDENTS WITH SEVERE DISABILITIES

National

Full Inclusion

Site Network

1216

SAN FRANCISCO STATE UNIVERSITY 14 TAPIA DRIVE SAN FRANCISCO, CALIFORNIA 94132 415-338-7847 415-338-7848

NATIONAL FULL INCLUSION SITE NETWORK

Last year CRI set out to identify full inclusion programs throughout the nation and the Pacific jurisdictions. To accomplish this task we asked personnel from statewide systems change projects, LRE projects, State Departments of Education, and "experts" in the field to identify full inclusion programs. CRI provided a definition for full inclusion to give these individuals a clear understanding of what CRI means when using the term full inclusion. The definition is as follows:

- Zero rejection;
- There is a natural proportion of the students with severe disabilities at a school site and assignment to general education classrooms;
- Primary membership for the student with disabilities is in an age-appropriate general education classroom;
- No special education classroom exists, except as a place for integrated activities and available to a variety of educational support programs;
- The IEPs for the students with severe disabilities are written and implemented by both the general and special education teacher, and the ancillary staff;
- The students with disabilities receive support within the general education program from special education staff; and
- Students with disabilities attend the school that they would attend if nondisabled, or a school of choice within a reasonable transportation distance.

Programs identified were then asked to complete a checklist in order to provide us with some specific information regarding their programs.

It is important to note that CRI has not had the opportunity to visit all of these school sites and/or validate their full inclusion efforts. We present this list based on the sites' indicating that they wished to be included on a national list of full inclusion programs.

The list of schools that have consented to being published is attached. We hope that this list will be helpful to parents and educators who may wish to network with schools who value and support full inclusion practices for children with severe disabilities.

FULL INCLUSION SITES

ARIZONA

Paradise Valley Unified (Suburban)
- *Aire Libre Elementary* – K-6, 600 students
- *Arrowhead Elementary* – K-6, 731 students
- *Desert Shadows Middle School* – Grades 7-8, 944 students
- *Larkspur Elementary* – K-6, 731 students
- *Liberty Elementary* – K-6, 650 students
- *Sunrise Middle School* – Grades 7-8, 986 students
- *Village Vista Elementary* – K-6, 944 students
  Contact: Jennifer Campbell (602) 493-6260
  Paradise Valley Unified
  3540 E. Cholla
  Phoenix, Arizona 85028

CALIFORNIA

Cajon Valley Union School District (Suburban)
- *Rancho San Diego Elementary* – Principal: Paul Nelson, K-6, 550 students
  Contact: Linda Choy (619) 588-3215
  4207 So. Tropico Drive
  La Mesa, California 91941

Colusa County Office of Education (Rural)
- *Colusa High* – Principal: Dr. Jim Lutz, Grades 9-12, 380 students
  Contact: Debbie Doss (916) 458-8891
  Colusa County Office of Education
  400A Fremont Street
  Colusa, California 95932
- *Kids County Preschool* – Director: Vicky Meyers, Preschool, 35 children
  Contact: Molly Peterson (916) 473-2777
  Kids County Preschool
  5758 Hankins Road
  Williams, California 95987
- *Williams Elementary* – Principal: Anthony Katsaris, K-3, 325 students
  Contact: Kim Morris (916) 473-2885
  Williams Elementary
  P.O. Box 7
  Williams, California 95987

Colusa Unified School District (Rural)

- *Burchfield Primary School* – Principal: Linda Denton, K-3, 489 students

Contact: Linda Denton (916) 458-5853
400 Fremont
Colusa, California 95932

El Dorado County Office of Education (Rural)

- *Edwin Markham Middle School* – Principal: Knute Momberg, Grades 6-8, 500 students

Contact: Dona Meinders (916) 622-7130
El Dorado County Office of Education
6767 Green Valley Road
Placerville, California 95662

Lemoore Union High School District (Rural)

- *Lemoore High* – Principal: Michael Cawley, Grades 9-12, 1400 students

Contact: Michael Cawley (209) 924-6600
Lemoore High
101 E. Bush Street
Lemoore, California 93245

Livermore Joint Unified School District (Suburban)

- *Christensen School* – Principal: Arnold Moore, Grades 1-7, 759 students

Contact: Lisa Celniker Burhart (510) 449-6981
3663 Jerrold Road
Livermore, California 94550

Lassen County SELPA (Rural)

- *McKinley Elementary School* – Principal: David Burriel, K-4, 1200 students

Contact: Mary Ann Murin (916) 257-5161
McKinley Elementary School
4th Street
Susanville, California 96130

Napa Valley Unified School District (Suburban)

- *Carneros Elementary* – Principal: Bonnie Broxton
- *Salvador Elementary* – Principal: Susan Wight, K-6, 200 students
- *Shearer Elementary* – Principal: Lou Martin

Contact: Pamela Schmidt (707) 253-6904
Salvador Elementary
1850 Salvador Avenue
Napa, California 94558

Santa Cruz County Office of Education (Rural/Suburban)

- *Harbor High* – Principal: Ken Thomas, Grades 9-12, 1150 students
  Contact: Debbie Zehnder (408) 625-1295
  4380 Nicker Court
  Soquel, California 95073
- *Quail Hollow Elementary* – Principal: Paula Simmons, K-6, 662 students
  Contact: Paula Simmons (408) 336-5193
  Quail Hollow Elementary
  6134 Highway 9
  Felton, California 95018

Shasta County Office of Education (Rural)

- *Shasta Community College* – College age, 5,600 students
  Contact: Kandis Lighthall (916) 222-0582
  3200 Adams Lane
  Redding, California 96002

Yolo County Office of Education (Suburban)

- *North Davis Elementary* – Principal: David Madrigal, K-6, 600 students
- *Valley Oak Elementary* – Principal: Connie Coughran, K-6, 600 students
- *West Davis Elementary* – Principal: Norm Enfield, K-3, 780 students
  Contact: Linda Brooks (916) 757-5470
  Valley Oaks Elementary
  1400 E. 8th Street
  Davis, California 95616

COLORADO

Adams County School District #14 (Urban)

- *Hanson Elementary School* – Principal: Peter Bonaker, Pre-5, 280 students
  Contact: Paula Farkas/Peter Bonaker (303) 288-9715/289-3943
  Hanson Elementary School
  7133 E. 73rd Avenue
  Commerce City, Colorado 80022

Boulder Valley Schools (Suburban)

- *Louisville Elementary School* – Principal: Arnold Levihn, K-5, 520 students
  Contact: Arnold Levihn (303) 666-6562
  Louisville Elementary School
  400 Hutchinson
  Louisville, Colorado 80027

Weld County School District #6 (Rural/Suburban)

- 21 Schools – Pre-12, 11,850 students
  Contact: Marilyn Minors (303) 352-1543
  Weld County School District #6
  Pupil Services
  811 – 15th Street
  Greeley, Colorado 80631

GUAM

Guam Department of Education (Suburban)

- *Wettengel Elementary* – Principal: Teresita Mantanoña, K-5, 770 students
  Contact: June DeLeon (671) 649-1064
  Guam Department of Education
  P.O. Box DE
  Agana, Guam 96910

ILLINOIS

DeKalb School District #428 (Rural)

- *Chesebro* – Principal: Larry Fullerton, K-4, 316 students
  Contact: Jill Wennmaker (815) 895-2032
  Chesebro
  900 Garden Street
  DeKalb, Illinois 60115
- *Clinton Rosette Middle School* – Principal: Tom Burski, Grades 5-6, 601 students
  Contact: Tom Burski/Lisa Gorchels (815) 758-7433/758-2484
  Clinton Rosette Middle School
  650 N. 1st Street
  DeKalb, Illinois 60118
- *Huntley Junior High* – Principal: William Sanders, Grades 7-8, 500 students
  Contact: William Sanders/Anne Crowe (815) 758-7434/758-0118
  Huntley Junior High
  821 S. 7th Street
  DeKalb, Illinois 60115

Illinois District #135 (Suburban)

- *Orland Center School* – Principal: Robert Blain, K-3, 604 students
  Contact: Mary Wells (708) 349-5382
  Orland Center School
  9407 W. 151st Street
  Orland Park, Illinois 60462

Illinois District #204 (Suburban)

- *McCarty School* – Principal: LoAnne Worth, K-5, 674 students
  Contact: LoAnne Worth/Tina Burnett (708) 820-1200
  McCarty School
  3000 Village Green Drive
  Aurora, Illinois 60504

Oakbrook/Butler #53 (Suburban)

- *Brook Forest* – Principal: John Jackson, K-5, 380 students
  Contact: Michael Raczak (708) 325-6888
  Brook Forest
  60 Regent Drive
  Oakbrook, Illinois 60521

IOWA

Cedar Falls Community Schools (Suburban)

- *Helen Hanson Elementary School* – Principal: H. James Jackson, K-6, 494 students
  Contact: H. James Jackson (319) 277-1194
  Helen Hanson Elementary School
  616 Holmes Drive
  Cedar Falls, Iowa 50613

Storm Lake Community Schools (Rural)

- *East Elementary* – Principal: Ed Rude, K-6, 475 students
  Contact: Lori Porsch (712) 732-2257
  Arrowhead Area Education Agency
  628 Geneseo Street
  Storm Lake, Iowa 50588

KANSAS

East Central Kansas Cooperative in Education Interlocal District #614 (Rural)

- *Baldwin Elementary School* – Principal: Tom Mundinger
- *Baldwin Junior High* – Principal: Chryss Brunner, Grades 6-8, 242 students
- *Nottingham Elementary* – Principal: Thomas Jerome, K-6, 510 students
  Contact: Caren Lowe/Debbie Mathews (913) 594-2737
  East Central Kansas Cooperative in Education
  717 High Street
  Baldwin City, Kansas 66006

KENTUCKY

Kenton County Board of Education (Rural/Suburban)

- *Kenton Elementary* – Principal: Charlie Miller, Pre-5, 470 students
- *Taylor Mill Elementary* – Principal: Gayle Helmer, K-5, 706 students

Contact: Mike Burge (606) 331-7742
Ft. Wrigth School
501 Farrell Drive
Covington, Kentucky 41011

MAINE

Maine S.A.D. #4 (Rural)

- *Benton Elementary School* – Principals: Suanne Giorgetti & John Bacon, Grades 1-6, 810 students

Contact: Suanne Giorgetti (207) 453-4941
Benton Elementary School
62 Old Benton Neck Road
Benton, Maine 04937

Waterville School District (Rural/Urban)

- *Brookside Elementary School* – Principal: Nora Murray, Grades 1-3, 622 students

Contact: Nora Murray (207) 873-0695
Brookside Elementary School
Drummond Avenue
Waterville, Maine 04901

- *Waterville Junior High School* – Principal: Russell Clukey, Grades 6-8, 482 students

Contact: Russell Clukey (207) 873-2144
Waterville Junior High School
100 West River Road
Waterville, Maine 04901

MINNESOTA

St. Cloud Community Schools District #742 (Urban/Rural)

- 14 Schools – K-12, 11,000 students

Contact: Marg Moore (612) 253-5857
Westwood Elementary School
5800 Ridgewood Road
St. Cloud, Minnesota 56303

MONTANA

Corvalis School District (Rural)
- *Marion Daley Elementary*
- *Sarah Schumacher High School*
  Pre-12, 800 students combined
  Contact: Linda VonLavin (406) 961-3009
  Corvalis School District
  P.O. Box 700
  Corvalis, Montana 59828

NEW HAMPSHIRE

Haverhill Cooperative (Rural)
- 6 Schools - Pre-12, 1,796 students
  Contact: Janice Jacobs (603) 747-8158
  Special Needs Office
  RFD 2, Box 33
  Woodsville, New Hampshire 03785

Lebanon School Administrative Unit #32 (Rural)
- *Mt. Lebanon Elementary* - Principal: Geri Williams, K-3, 315 students
  Contact: Brenda Needham/Geri Williams (603) 448-1634/298-8202
  Lebanon School Administrative Unit #32
  84 Hanover Street
  Lebanon, New Hampshire 03766

NEW MEXICO

Albuquerque Public Schools (Suburban)
- *Chaparral Elementary* - Principal: Mary Ann Anderson, K-5, 940 students
  Contact: Nancy Lacher (505) 831-6314
  Chaparral Elementary
  6324 Milne Road
  Albuquerque, New Mexico 87120

NEW YORK

Syracuse City School District (Urban)
- *Edward Smith School* – Principal: Patricia Howard, K-6, 830 students
  Contact: Patricia Howard (315) 435-4650
  Edward Smith School
  1106 Lancaster Avenue
  Syracuse, New York 13210

Yorkshire–Pioneer C.S.D. (Rural)
- *Arcade Elementary & Middle School* – Prinicipals: William O'Connell or Mary Simons, K-6, 3,500 students
  Contact: James Oubre (716) 492-1350
  Yorkshire–Pioneer C.S.D.
  P.O. Box 579
  Yorkshire, New York 14173

OREGON

Lincoln County School District (Rural)
- 21 Schools – K-12, 6425 students
  Contact: Mona Glode (503) 269-4404
  P.O. Box 1110
  Newport, Oregon 97365

Tigard Tualatin School District #23J (Suburban)
- Entire District – K-12, 9000 students
  Contact: Petrea Hagen-Gilden (503) 538-6242
  Tigard Tualatin School District #23J
  13137 S.W. Pacific Highway
  Tigard, Oregon 97223

TEXAS

Iraan–Sheffield I.S.D. (Rural)
- *Iraan Elementary* – Principal: Bill McClure, Pre-5, 234 students
  Contact: Bill McClure (915) 639-2524
  Iraan Elementary
  P.O. Box 486
  Iraan, Texas 79744

VERMONT

Bakersfield School District (Rural)

- *Bakersfield Elementary School* – Principal: Judith Ouellette, K-8, 172 students
  Contact: Kathy Tefft (802) 827-6611
  Bakersfield Elementary School
  P.O. Box 17
  Bakersfield, Vermont 05441

Lyndon Town Schools (Rural)

- *Lyndon Town Schools* – Principals: George Fuller & Linda Morrow, K-8, 720 students
  Contact: Sue Keefe/George Fuller/Linda Morrow (802) 467-3737
  P.O. Box 101
  East Haven, Vermont 05837

Milton Graded School District (Rural)

- *Herrick Avenue Elementary* – Principal: Larry Messier, K-4, 777 students
- *Milton Junior/Senior High School* – Principal: Donald Bradley, Grades 7-12, 796 students
- *School Street Elementary* – Principal: Charles Ham, Grades 5-6, 262 students
  Contact: Jan Keffer (802) 893-3220
  Milton Special Services
  42 Herrick Avenue
  Milton, Vermont 05468

South Burlington School District (Suburban)

- 5 Schools – K-12, 2000 students
  Contact: Linda Piasecki (802) 658-9060
  500 Dorset Street
  South Burlington, Vermont 05403

Swanton Schools (Rural)

- *Swanton Elementary & Central Schools* – Principal: Mary Lynn Riggs, K-6, 675 students
  Contact: Mary Lynn Riggs/Cathy Quinn (802) 868-4417
  Swanton Schools
  Swanton, Vermont 05488

Washington West Supervisory Union (Rural)

- 7 Schools – K-12, 1750 students
  Contact: Zelda Zeleski (802) 244-8877
  Washington West Supervisory Union
  P.O. Box 1065
  Moretown, Vermont 05660

Winooski School District (Rural)
- *JKF Elementary & Winooski Middle/High Schools* – Principals: Rod Ross & Sandi Tanquay, Pre-12, 775 students
  Contact: Richard Villa (802) 655-9575
  80 Normand Street
  Winooski, Vermont 05404

WASHINGTON

Central Kitsap School District (Suburban)
- *Silver Ridge Elementary* – Principal: B.J. Wise, K-6, 600+ students
  Contact: B.J. Wise (206) 698-4584
  Silver Ridge Elementary
  P.O. Box 8
  Silverdale, Washington 98383

Lake Washington School District (Suburban)
- *Emily Dickinson Elementary* – Principal: Jeffrey Newport, Pre-6, 580 students
  Contact: Jeffrey Newport (206) 868-2615
  Emily Dickinson Elementary
  7300 – 208 Avenue, N.E.
  Redmond, Washington 98053

APPENDIX B

PEERS Project Inclusive Education Guidelines

PEERS

PROVIDING EDUCATION FOR EVERYONE IN REGULAR SCHOOLS

PROJECT DIRECTOR
Patrick Campbell, Asst. Superintendent/Dir.
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3567
(916) 657-5086 FAX

REGIONAL OFFICES
Tom Neary
650 Howe Avenue
Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D.
Ed. Psychology Dept.
CSU, Hayward
Hayward, CA 94542
(510) 881-3087 or
(415) 338-7849

Suzanne M. Gilbert
El Toro HS, Room 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8558
(714) 837-5066 FAX

Steve Johnson, Administrator
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 657-3256
(916) 657-5086 FAX

Inclusive Education/ Supported Education

The following characteristics are indicators of fully inclusive programs for students with disabilities. They are meant as guidelines in planning for inclusion and also as a means for maintaining the integrity of the term, Inclusive or Supported Education.

1. Students are members of chronologically age-appropriate general education classrooms in their normal schools of attendance, or in magnet schools or schools of choice when these options exist for students without disabilities.
2. Students move with peers to subsequent grades in school.
3. No special class exists except as a place for enrichment activities for all students.
4. Disability type or severity of disability does not preclude involvement in full inclusion programs.
5. The special education and general education teachers collaborate to ensure:
   a. the student's natural participation as a regular member of the class
   b. the systematic instruction of the student's IEP objectives
   c. the adaptation of core curriculum and/or materials to facilitate student participation and learning
6. Effective instructional strategies (e.g. cooperative learning, activity-based instruction, whole language) are supported and encouraged in the general education classroom.
7. The staff to student ratio for an itinerant special education teacher is equivalent to the special class ratio and aide support is at least the level it would be in a special class.
8. Supplemental instructional services (e.g. communication, mobility, adaptive P.E.) are provided to students in classrooms and community settings through a transdisciplinary team approach.

Neary, T., Halvorsen, A., & Smithey, L. (1992). Inclusive education guidelines. Sacramento, CA: PEERS Project, California State Department of Education.

A Statewide Systems Change Project for the Integration of Students with Severe Disabilities. Sponsored by the California Department of Education, Special Education Division

9. Regularly scheduled collaborative planning meetings are held with general education staff, special education staff, parents and related-service staff in attendance as indicated, in order to support initial and ongoing program development and monitoring.

10. There is always a certificated employee (special education teacher, resource specialist or other) assigned to supervise and assist any classified staff (e.g. paraprofessional) working with specific students in general education classrooms.

11. Special education students who are fully included are considered a part of the total class count for class size purposes. In other works, even when a student is not counted for general education ADA, s/he is not an "extra" student above the contractual class size.

12. General ability awareness is provided to staff, students and parents at the school site through formal or informal means, on an individualized basis. This is most effective when ability awareness is incorporated within general education curriculum.

13. Plans exist for transition of students to next classes and schools of attendance in inclusive situations.

14. Districts and SELPAs obtain any necessary waivers of the Education Code to implement supported education.

15. Supported education efforts are coordinated with school restructuring at the district and site level.

In summary, all students are members of the general education classroom, with some students requiring varying levels of support from special education. Hence the term "Supported Education". This term, though synonymous with "Full Inclusion", is explicit in acknowledging the importance of providing support services within the regular classroom, when necessary, to ensure a quality education program.

PEERS 1992

APPENDIX C

Individualized Program Development Forms TRCCI & PEERS, 1992

- Environmental Inventory
- Parent Interview
- IEP Objective/Classroom Schedule Matrix
- Classroom Activity Analysis Worksheet
- Critical Skills Summary

ENVIRONMENTAL INVENTORY - SCHOOL SITE

Training and Resources for Community and Curriculum Integration

Date ______________________________

Site ______________________________ Inventoried by ______________________________

1. School demographics

A. Number of classes at each grade level

B. Class sizes

C. Instructional assistants in general education classes?

D. Additional support staff/volunteers

2. General school schedule (include arrival, recess, class periods, lunch, dismissal, homeroom)

TRCCI; 1992. Calif. Dept. of Education

ENVIRONMENTAL INVENTORY - SCHOOL SITE *(CONT.)*

3. Organizational structure

A. Administrative structure (who is responsible for what?)

B. Department meetings? When?

C. Faculty meetings? When?

D. Staff duties (bus/lunch duty, etc.)

E. Established school support teams (school governance, PTA, student study teams, school improvement plan, school site council)

4. Peer support programs (peer tutoring, peer counseling)

5. School information methods (i.e., newsletters, bulletin boards, announcements)

6. Classes offered (secondary - i.e., journalism, photography, etc.)

Additional class activities offered (elementary)

TRCCI; 1992. Calif. Dept. of Education

ENVIRONMENTAL INVENTORY - SCHOOL SITE *(CONT.)*

7. Class registration/scheduling (procedure for enrollment)

8. Extracurricular opportunities (i.e., clubs, athletics, drama, scouts, etc.)

Procedures for enrollment

Cost(s) involved

9. Special events (i.e., graduation, homecoming, assemblies, prom, fund-raisers, class trips)

10. Opportunities for parent involvement (i.e., PTA school improvement team, etc.)

11. Safety issues

12. Special rules, considerations, expectations (student handbook, discipline policy)

TRCCI; 1992. Calif. Dept. of Education

ICSM
FAMILY INTERVIEW

Interview date ______________________

Student ______________________

Birthdate ______________________

Address ______________________

____

Phone (Home) ______________________ Phone (Work) ______________________

Directions to place of interview ______________________

____

Parent/Care provider's name ______________________

Other individuals to contact:

Name ______________________

Phone ______________________

Relation ______________________

Permission granted ______________________

Best time and day for contact ______________________

Phone ______________________

Best time and day(s) available for planning meetings ______________________

Local environments: ______________________

____

Medical considerations ______________________

____

____

Equipment considerations ______________________

____

____

Additional services providers (Regional Center, CCS, etc.) ______________________

____

____

Revised 6/92 • Gorevin, Kanda, Meinders, Neary, Perlroth; Training and Resources for Community and Curriculum Integration (TRCCI). Calif. Dept. of Education.

WEEKDAY SCHEDULE

Student ______________________________________

List information from the time the student gets up and goes to school until the time he/she arrives home from school and goes to bed.

MORNING ROUTINE

Student participation	Area to target	Family	Student

TRCCI; 1992

WEEKDAY SCHEDULE

Student ____

List information from the time the student gets up and goes to school until the time he/she arrives home from school and goes to bed.

AFTERSCHOOL ROUTINE

Student participation	Area to target	Family	Student

TRCCI; 1992

WEEKDAY SCHEDULE *(CONT.)*

EVENING ROUTINE

Student participation	Area to target	Family	Student

WEEKEND ROUTINE

Student participation	Area to target	Family	Student

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BEHAVIORAL AND BASIC SKILLS INFORMATION

Student ______________________________________

Activities student likes to do/does not like to do

How does s/he let you know? *(If parent is providing information)*

Interaction student enjoys/does not enjoy

How does s/he let you know?

Tell me about friendships/relationships. What are some of the things your child does with friends?

What are your dreams for you son/daughter?

Is there any additional information about your son/daughter that we haven't talked about regarding:

Communication (receptive/expressive)

Mobility

Toileting

Foods/drinks s/he likes or dislikes

Are there any behaviors of concern?

BEHAVIORAL AND BASIC SKILLS INFORMATION *(CONT.)*

How do you deal with problem behaviors?

Describe the best way for your childto learn a new skill.

Describe your child's opportunities for decision/choicemaking

List some of your child's strengths.

How does your child problem solve? Make decisions?

MEDICAL

Medications used ______________________

When ______________________

Physician ______________________

Allergies ______________________

Side effects of medication ______________________

Impact on learning ______________________

Other ______________________

What things that we haven't talked about yet are important to you or other family members?

1240

BEHAVIORAL AND BASIC SKILLS INFORMATION *(CONT.)*

	Student	Parent
How do you feel about the school program?		
Types of support you would like?		
What are your preferences for:		
Extra-curricular activities?		
Classes/subjects		
Activities		
Clubs		
Jobs		

	Parent
How would you like to be involved in the school?	
What is the best way for us to communicate?	
What are some of the benefits you see as a result of the school program?	

1241

FAMILY PREFERENCE FOR ACTIVITIES AND ENVIRONMENTS

Student ______________________________ Date ____________________

1. List the prefered activities (not basic skills) and environments for one, two or three years from now in each of the following areas.
   INTERVIEWER: Use your information from community inventory file and student's immediate neighborhood inventory to assist parents/care providers.

2. After completing the list, note if it is a student or family preference for each activity.

Domestic	S F Pref.	Recreation/Leisure	S F Pref.	School	S F Pref.	Community	S F Pref.	Vocational	S F Pref.
1242								1243	

TRCCI; 1992

INITIAL SUMMARY OF BASIC SKILLS AND CRITICAL ACTIVITIES

Student ______________________________ Date ____________________

	PRIORITY 1, 2, 3, 4	HIGH PREFERENCE ACTIVITIES	BASIC SKILLS													
DOMESTIC																
REC/ LEISURE																
SCHOOL																
COMMUNITY																
VOCATIONAL																

Revised 6/92 Gorevin, Kanda, Neary, Perlroth; TRCCI. Calif. Dept. of Education.

PEERS

IEP Obj./Classroom Schedule Matrix

✔ = Opportunity to work on student's IEP objectives

	Classroom Schedule										
IEP Obj.											

PEERS

Classroom Activity Analysis Worksheet

☐ As is ☐ Physical Assist. ☐ Adapt Materials ☐ Multi-level ☐ Curriculum Overlap

Name ____________________ Date ____________

Activity ____________________

Classroom activity steps	Student performance	Specific adaptations	Skills in need of instruction

Comments/Recommendations:

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PEERS Project 1991

PEERS

CRITICAL SKILLS SCHEDULE

Name ______________________________

Activities/Routines/Environments

Critical Skill Needs

Adapted from McGrath, 1991

Appendix I

PEERS
Inclusive Education
Guidelines

PEERS

Providing Education for Everyone in Regular Schools

PROJECT DIRECTOR

Patrick Campbell, Asst. Superintendent/Dir.
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 323-4768

REGIONAL OFFICES

Tom Neary
650 Howe Avenue, Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D
Ed. Psychology Dept.
CSU, Hayward
Hayward, CA 94542
(415) 881-3087 or 338-2849

Lynn Smithey
El Toro HS, Rm. 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8558

Steve Johnson, Consultant
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 323-4871

DRAFT

Inclusive Education/Supported Education

The following characteristics are indicators of fully inclusive programs for students with disabilities. They are meant as guidelines in planning for inclusion and also as a means for maintaining the integrity of the term, Inclusive or Supported Education.

1. Students are members of chronologically age-appropriate general education classrooms in their normal schools of attendance, or in magnet schools or schools of choice when these options exist for students without disabilities.

2. Students move with peers to subsequent grades in school.

3. No special class exists except as a place for enrichment activities for all students.

4. Disability type or severity of disability does not preclude involvement in full inclusion programs.

5. The special education and general education teachers collaborate to ensure:
   a. the student's natural participation as a regular member of the class
   b. the systematic instruction of the student's IEP objectives
   c. the adaptation of core curriculum and/or materials to facilitate student participation and learning.

6. Effective instructional strategies (eg. cooperative learning, activity-based instruction, whole language) are supported and encouraged in the general education classroom.

7. The staff to student ratio for an itinerant special education teacher is equivalent to the special class ratio and aide support is at least the level it would be in a special class.

8. Supplemental instructional services (eg. communication, mobility, adaptive P.E.) are provided to students in classrooms and community settings through a transdisciplinary team approach.

9. Regularly scheduled collaborative planning meetings are held with general education staff, special education staff, parents and related-service staff in attendance as indicated, in order to support initial and ongoing program development and monitoring.

10. There is always a certificated employee (special education teacher, resource specialist or other) assigned to supervise and assist any classified staff (eg. paraprofessional) working with specific students in general education classrooms.

11. Special education students who are fully included are considered a part of the total class count for class size purposes. In other words, even when a student is not counted for general education ADA, s/he is not an "extra" student above the contractual class size.

12. General ability awareness is provided to staff, students and parents at the school site through formal or informal means, on an individualized basis. This is most effective when ability awareness is incorporated within general education curriculum.

13. Plans exist for transition of students to next classes and schools of attendance in inclusive situations.

14. Districts and SELPAs obtain any necessary waivers of the Education Code to implement supported education.

15. Supported education efforts are coordinated with school restructuring at the district and site level.

In summary, all students are members of the general education classroom, with some students requiring varying levels of support from special education. Hence the term "Supported Education". This term, though synonymous with "Full Inclusion", is explicit in acknowledging the importance of providing support services within the regular classroom, when necessary, to ensure a quality educational program.

PEERS 1992
With appreciation to Dr. Wayne Sailor, "Special Education in the Restructured School" Remedial and Special Education, *12, 6* (1991).

Appendix J

Hanline, M.F. & Halvorsen, A.T. (1989)

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Exceptional Children, Vol. 55, No. 6, pp. 487–492.

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Parent Perceptions of the Integration Transition Process: Overcoming Artificial Barriers

MARY FRANCES HANLINE
ANN HALVORSEN

ABSTRACT. The parents of 14 students with disabilities participated in interviews to evaluate the support they received during their child's transition to an integrated educational placement, to explore their concerns, and to discuss the effects of integration. Although parents identified areas of concern, they consistently expressed satisfaction regarding the outcomes of integrating their child, including professional and personal support. Responses emphasized the importance of commitment from local school districts and professionals, an individualized approach to parent involvement, and ongoing communication with parents.

☐ Life cycle transitions are experienced by all families. When a child with a disability is a member of the family, however, these changes can serve to magnify a child's special needs (Fewell, 1986; Hanline, 1988). In addition, families of children with disabilities may experience transitions unique to their situation, such as a younger sibling developmentally surpassing the child with a disability (Turnbull & Turnbull, 1986; Wikler, 1981). Given the current trend to integrate children with even the most profound disabilities, an additional change for these families may be making a transition from a segregated to an integrated eduational setting.

Although educators perceive this integration transition as a positive change, the transition may be stressful for parents (Biklen, 1985; Halvorsen, 1983, 1984). Therefore, educators must examine how to provide individualized support for families during this time. Research related to the integration transition is minimal and focuses on identifying parent perceptions of the pros and cons of integration, rather than on support activities that parents feel may be helpful (e.g., Bailey & Winton, 1987; McDonnell, 1987). Given this lack of information, the purpose of the present study is to explore parent perspectives on support services and involvement activities, concerns regarding the integration transition, and perceptions of the effects of integration for their child and family.

METHOD

Participants

Parents from 13 families in the San Francisco Bay Area participated in this study. Fourteen students were represented (one set of parents had 2 children who were disabled). Table 1 presents information about the participants. The students ranged in age from 4 to 22 years. A variety of disabilities was represented, with 11 of the students classified as severely handicapped. All students had moved from a segregated special education setting to an integrated, age-appropriate regular education public school at some point in their education.

MARY FRANCES HANLINE *is Assistant Professor, Department of Special Education, The Florida State University, Tallahassee.* ANN HALVORSEN *is Coordinator, State-Wide Integration Project PEERS, Instructor, California State University, Hayward.*

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BEST COPY AVAILABLE

Procedures

Parents were asked by the authors to participate in the study. All parents who were contacted agreed to be interviewed. The authors knew the parents to be actively involved in their children's education and selected them because of the awareness that would result from this involvement.

The interviews were conducted in the homes of the parents or in other locations selected by the parents (e.g., restaurant) by two graduate students in special education. Nine of the mothers and two of the fathers were interviewed alone. Two couples were interviewed. The interview consisted of questions about the support parents received during the transition and their involvement in it, as well as questions about the effects of integration and the students' educational placements.

RESULTS

The catalyst for their child's integration (e.g., what prompted the move from a segregated to an integrated placement) placed the parents in one of three groups. That is, two parents made the transition from an infant intervention program (which did not include nondisabled children) to an integrated preschool, five parents were part of a school district-wide transition, and seven parents had been prime advocates for the transition.

Educational Placements

Parents were asked to rank their satisfaction with each educational program their child attended at any point in the child's life on a 1 (not at all satisfied) to a 5 (extremely satisfied) rating scale. No relationship between the degree of satisfaction and extent of integration, age of student, catalyst for integration, or disability was evident.

Parent Support

Parents identified family members and other parents as the primary sources of emotional support. They provided this support by listening empathically and by embracing the parents' decision to integrate their child. Parents told us:

> The best support came from other parents . . . talking on the phone, coming by for coffee. I was really reaching out, so any kind comment from anybody was accepted. (mother of a 5-year-old girl)
>
> I could never have done this without my wife . . . We're a good team, which is terribly important. (father of a 7-year-old boy)

All the parents had some supportive contact with educators, and many sought out the expertise of professionals. The majority reported that one particular educator had been especially supportive and that they had relied heavily on that professional for information and words of encouragement. One parent who had advocated for integrated services stated:

> If she [the teacher] hadn't been supportive to the degree that she was . . . it would have been a lot harder . . . As much as everyone in administration hated me, she was OK. She was enough of an ally so that what I was doing was not going to affect the way she was treating my daughter. (mother of a 15-year-old girl)

Parents who were the prime advocates often sought the support of community advocacy groups. The advocacy groups assisted parents with information about their legal rights and helped develop strategies to bring about integration. One parent told us that the commitment to integration of the adults with disabilities who worked in the advocacy group helped her remain firm in her commitment. In addition, all seven parents in this group had hired advocates to assist them.

Parent Involvement

All parents were involved in the transition. Incorporating integration as a component of the child's Individualized Education Plan (IEP) and observing the child during integration activities were identified as involvement activities. Several parents provided disability awareness training for nondisabled peers, served on policy-making boards, participated in inservice training, and organized support groups. All parents for whom the catalyst for integration was the transition from an infant intervention program or a districtwide transition were satisfied with their involvement. Parents who had been advocates for their child's integration expressed the least satisfaction. Although secure in their decision to push for integrated programs, the following quotes convey the frustration parents felt:

> One of the hardest parts is having people not like you. It's very hard to put yourself in the position of being perceived of as a pain, as a trouble-maker. . . . Parents should not have to go through some of the things that we've had to go through. I had to do too much, I think. (mother of a 15-year-old girl)
>
> We had to fight for what we wanted. It was unpleasant to do that at the time, but it's like a lot of things that are unpleasant. You learn something.

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TABLE 1
Identifying Information

Parent Interviewed	*Catalyst for Integration*	*Age of Student*	*Sex of Student*	*Disability*
Mother	Districtwide transition	22	F	•Multiply handicapped, blind
Mother	Prime advocate	20	M	•Down syndrome
Mother	Prime advocate	17	F	•Cerebral palsy Cystic fibrosis
Mother	Prime advocate	15	F	•Cerebral palsy
Mother	Districtwide transition	14	F	•Williams syndrome
Mother	Districtwide transition	9	F	•Neurodegenerative condition
Father	Prime advocate	9	M	•Multiply handicapped
Father	Prime advocate	7	M	•Down syndrome
Mother & Father	Prime advocate	7	F	Communication handicap, motor delays
Mother	Districtwide transition	6	M	•Neurodegenerative condition
Mother & Father	Prime advocate	5	F	Cerebral palsy
Mother	Districtwide transition	5	M	•Severe developmental delay, hypertonicity
Mother	Infant program to integrated preschool	5	F	•Multiply handicapped
Mother	Infant program to integrated preschool	4	F	Severe communication disorder

• School district severely handicapped classification.

> I'm a better advocate for my son as a consequence (father of a 7-year-old boy)

Although able to recognize positive outcomes from assuming advocacy roles, parents resented the extent of their involvement. As one parent asked, "Why wasn't it done by the people whose job it is to do it?"

Pretransition Parent Concerns

Parents identified six areas of pretransition concern: safety, attitudes of regular education students and staff, program quality, transportation, district commitment, and potential for failure.

Safety. Most parents expressed concern regarding their child's physical safety in a regular education school. This seemed to have less to do with any expectations of intentional wrongdoing than with possible accidents, such as a child's wheelchair being tipped over inadvertently on the playground. Other parents expressed fears regarding emergency situations, and two parents of secondary-aged students worried about their child being taken advantage of sexually.

Attitudes of Regular Education Students and Staff. Fears of rejection, as well as concerns regarding how their child's disability would be perceived by nondisabled students, were frequently identified by parents. Some worried that their child would be babied or patronized. Parents also were concerned about their child's acceptance by the regular education staff. Further, parents wondered whether regular educators would be able to respond appropriately to the nondisabled students' questions about their children.

Program Quality. How related services would be delivered in the integrated setting was a primary question of parents whose children had been attending a segregated setting. Parents recognized that on-site ancillary staff for every school might not be feasible with integration, particularly when the ratio of disabled to nondisabled students that occurs in society was maintained in the school (i.e., students with disabilities comprise 10% or less of the total school population). In addition, integration sometimes meant a move from a facility furnished with swimming pools, therapy units, and the like, to a school that might lack some of these amenities. Thus, parents feared that their child might not have the same access to resources when integrated. Further, an anticipated loss of a "dedicated staff" was mentioned by some parents. To these parents, the segregated school was an environment of total acceptance for them and their child, and they feared the loss of this supportive atmosphere.

Transportation. Two parents voiced concern about transportation changes accompanying integration. In these cases, as a result of a centralized county service model, the integrated classes were farther from the students' homes than were the segregated schools. However, this was not an issue for school districts that implemented a neighborhood school policy.

District Commitment to the Integrated Model. Many of the parents' concerns underscored their doubts about the commitment of school districts to providing integrated services in regular schools where the needs of many programs must compete for resources. One parent pointed out that the same school personnel who had assured her 10 years ago that the special education school was the setting offering the most programmatic advantages for her child were now laboring to convince her of the superiority of the regular public high school. The parent wondered how she could feel confident that they were right this time.

Potential for Failure. Several parents who had advocated for integration spoke of their underlying fear that the program or their child might "fail." Parents discussed fears such as a daughter's being perceived as "too much of a burden and not being allowed to stay" in the mainstreamed first grade and a teenager's being unable to adjust to the hectic pace of a middle school. Despite their belief in the opportunities presented by the integrated environment, these parents were afraid that their child might not "measure up."

Parent Perceptions of Integration Effects

Disadvantages. Five parents stated that there were no disadvantages to integration. Two parents expressed fears that their child's circle of friends *with* disabilities may be narrowed, depriving them of role models from *within* the disabled community. Others wondered whether any friendships would result from integration and whether integration would have an impact on their child's quality of life outside of school. Further, one parent stated that she wished her daughter had been integrated at a younger age because her daughter was unprepared for the social demands of high school. Another parent spoke about her daughter's struggle to reconcile her own new and more normalized expectations of herself with her disability. However, none of the parents regretted the placement of their children in an integrated setting.

Positive Effects. All parents identified skill enhancement as a positive effect, with social skill development cited as a primary benefit. Parents also commented on the increased stimulation available in integrated settings. In addition, the majority of parents discussed the positive impact on their children's self-esteem and talked about their children being less intimidated, more comfortable with people, and "more able to conform" to expectations. Nine parents addressed the fact that the integrated setting was a "real life" environment that would better prepare their children to live in the mainstream of society. One parent stated,

> When she's finished with school, she'll be able to be in some sort of integrated situation. She'll have social skills she wouldn't have had and an ability to function in more complex situations than she would've been able to do if she'd stayed segregated. (parent of a 15-year-old girl)

Friendships with nondisabled peers which extended outside of school hours were described for approximately one-half of the students. All parents spoke about the impact of these peers as role models. The majority of parents also observed benefits to nondisabled students such as improved attitudes toward disabilities. One parent told us:

> The kids were so receptive! All of my expectations had come from my attitude at that age, and these kids were completely different than I thought they'd be. (mother of a 6-year-old boy)

All parents stated that their expectations for their children had been raised. Others spoke of their "increased admiration" for their child and of their belief that their child would lead a more interesting and independent life as an adult. Parents stated that they now make more demands of and are less likely to overprotect their child.

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Parents also spoke of benefits to the family. Two parents mentioned that nondisabled siblings were now less concerned about the long-term care of their brother and sister. Several parents commented that integration had changed their family's focus away from the disability, had enabled them to see their child from "another less emotional standpoint," and had provided them with new comfort through seeing their child accepted by a broader range of people.

Facilitative Responses to Parent Concerns

The facilitative responses proposed here address the areas of parent concern identified by our interviews. Implementing these support strategies may assist parents with the transition, while demonstrating the district's commitment to quality service provision. We recommend that parents and school district staff work together in advance of moving students to integrated sites. Further, while each of the support strategies provided assistance to one or more of the parents we interviewed, all strategies will not be enthusiastically received by every parent, given the diversity of parental resources and needs.

Parent Representation on Planning Teams. Planning teams may be either districtwide or site specific, but should have the purpose of systematically planning for integration. Issues to be addressed include site selection and preparation, delivery of related services, design of social interaction and disability-awareness training programs, staff development, and emergency procedures. In addition, long-range planning around a zero reject policy, neighborhood school model, and individualized programming should occur within this team. Including parents on the team may help alleviate their concerns regarding district commitment, program quality, transportation, and safety. In addition, the development of a disability awareness curriculum and structured social interaction programs will help reduce concerns about the children's acceptance by regular educators and nondisabled peers.

Observation of Model Integrated School Sites. Visiting model integrated programs in the parents' own or nearby school districts may help relieve parent concerns. When integrated programs do not yet exist in a particular geographic area, parents and educators have relied on viewing videotapes of programs which successfully integrate students (Anderson & Halvorsen, 1987).

Linkage With Other Parents. Connecting parents with their peers may facilitate the transition, as parents often have common concerns and experiences they may wish to share. In addition, communicating with other parents may be less threatening to some parents than talking with school personnel. Parent linkage can occur formally through district-sponsored parent meetings and parent-organized parent groups or through less formalized networking activities and shared community-advocacy activities.

Ongoing Communication. It is critical that all constituencies have the same level of accurate information throughout the transition. Parental fears may be compounded by a lack of information. This mother's comment highlights the parents' need for information:

> I was really ignorant. I wasn't afraid. I just didn't know what was going to happen and what to expect. I didn't think it would be bad. I just didn't know. (mother of a 9-year-old boy)

In cases where the change is thrust upon parents without prior information, they may question the intentions of the school district. A structured plan for integration that parents help develop and that is disseminated to parents before the transition can be useful in reducing parent concerns regarding the district's commitment and program quality. This same communication should continue after integrated programming is implemented. Including parents in staff development or inservice activities on an ongoing basis and providing written information to parents through newsletters or a lending library can be used to continue to share information.

DISCUSSION

Thirteen parents of children with disabilities participated in interviews regarding making the transition from a segregated to an integrated educational setting. The results of our interviews suggest that parents recognize the benefits of integration and see no major disadvantages, although parents did identify areas of concern. The child's safety, the attitudes of regular education staff and nondisabled students, and the success and quality of the student's educational program were identified as concerns by parents in this study, as well as by the literature that describes integration projects involved in working with parents (cf., Biklen & Searl, 1985; Meyer & Kishi, 1985). In addition, positive outcomes identified by parents—enhanced learning opportunities, friendships with nondisabled peers, and increased parental expectations—are supported by research findings (Halvorsen & Sailor, in press).

Our data further indicated that parents want to be involved in the transition and find professional and personal support to be helpful during this time. However, parents in the position of advocating for integration resented having to assume this role: they felt professionals should have assumed the responsibility. Professionals who recognize the need to develop integrated programs may (because of their own perceptions of lacking influence to affect change) encourage parents to become the catalyst for needed service delivery change. However, these educators may be creating stressful situations for families. A more supportive role for educators would be to work collaboratively with parents in their school districts to advocate for integrated services.

We suggested ways for local school districts to involve and support parents. These responses require commitment from the districts, an individualized approach to parent involvement, and ongoing communication with parents. The critical characteristic appears to be the development of individualized options for support and participation based on parent-identified needs.

The results of our study must be interpreted with caution for several reasons. First, only a small number of parents within a restricted geographic location participated in the study. Second, we selected parents to participate who we knew had been actively involved in the integration transition. A larger and randomly selected sample of parents may respond differently than those in the present study. Finally, the interview format required parents to recall their experiences in the presence of an interviewer. Thus, the interview situation itself may have influenced parent responses.

However, the study is an initial step toward conceptualizing the integration transition as a potentially difficult time of change and identifying the influence of support in facilitating the transition. In addition, the study points the way for future research. For example, do parental needs differ as a function of the disabling condition, age, sex, ethnicity, or educational history of their child? How can educators identify the involvement and support appropriate for each family? Answers to these questions, as well as data on the social validity of existing vehicles for parental support, are needed to minimize parental stress and increase parent-professional collaboration throughout the integration transition.

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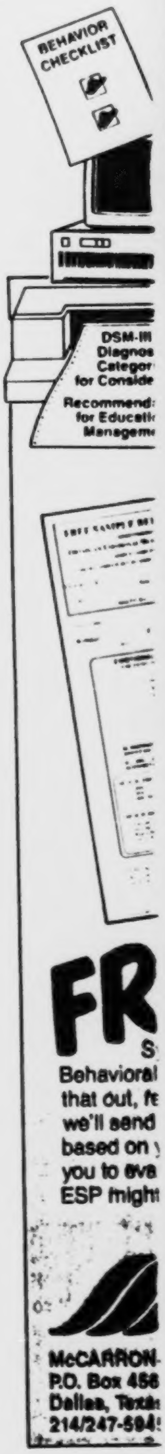
The authors wish to extend their appreciation to the parents who participated in the interviews and to Felicia Farron-Davis and Victoria McJenkin for conducting the interviews for this study. This research was supported in part by U.S. Department of Education Contract No. 300-82-0365 and Grant No. G009530068. The content and opinions expressed herein do not necessarily reflect the position or policy of the U.S. Department of Education, and no official endorsement should be inferred.

Manuscript received February 1988; revision accepted May 1988.



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Dallas, Texas
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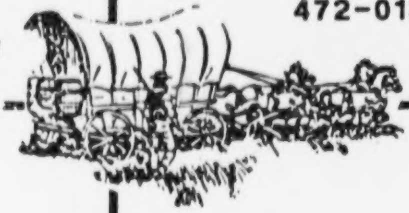
Appendix K

Waiver Sample
Lassen SELPA



OFFICE OF THE LASSEN COUNTY SUPERINTENDENT OF SCHOOLS
472-013 Johnstonville Road North Susanville, CA 96130
Telephone (916)257-2196 Fax (916)257-2518
William P. Gillaspie, Ed.D., Superintendent

June 21, 1990

Jack Hazekamp, Consultant
Special Education Division
California Department of Education
P. O. Box 944272
Sacramento, CA 94244-2720

Dear Jack:

Enclosed is our waiver request to modify Education Code Section 56364.1 which would allow severely handicapped students to receive all or most of their education in regular classrooms but still be enrolled and supported by a special day class. I would appreciate your review of our waiver application and am very open to your recommendations for change prior to the submission to the State Board for their consideration.

I am enclosing one copy of a paper which I prepared entitled "The Integration of the Handicapped Within American Society" which reflects an extensive look into the current research and literature available on the topic. This is provided for your information. I would suspect that the Board is not interested in anything this extensive to be included as a part of the waiver.

Thank you for your assistance in this matter. We look forward to your thoughts and comments on our waiver application.

Sincerely,

Mike

MICHAEL R. JUSTICE
SELPA Coordinator

MRJ/sar
Sr14

Enclosure

AN EQUAL OPPORTUNITY EMPLOYER

CALIFORNIA STATE DEPARTMENT OF EDUCATION
Special Education Division
Special Education Waiver and Extension Request
Form SED-01 (Rev. 8-87)

Special Education
WAIVER and EXTENSION REQUEST

(1) IDENTIFICATION

Name of County: Lassen

Name of SELPA: Lassen

County-District Code: 18 000000

Name of District(s) or County Office (if applicable): Lassen Co. Sup't. of Schools and Susanville Elementary

(2) SECTION NO. TO BE WAIVED

☒ Education Code Section No. 56364.1

☐ Title 5 CAC Section No.

Date of request: 6-20-90

Applicable School Year: 1990-91

(3) PURPOSE OF REQUEST

The purpose of this request is to allow individuals with exceptional needs usually identified as severely handicapped and who are usually placed in special day classes to receive all or a portion of their instruction in the regular classroom and also be enrolled in special classes.

(4) PROPOSED PLAN AND JUSTIFICATION

See attached.

Michael R. Justice
Signature of SELPA Administrator*

SELPA Coordinator (916) 257-2196
Title and phone number

Signature of District Administrator

Michael R. Justice
Contact person

SELPA Coordinator (916) 257-2196
Title and phone number

FOR SED USE ONLY
ACTION TAKEN

DEPARTMENT

☐ Approved

☐ Returned for Revision

☐ Denied

Date Action Taken:

Signature of designated staff:

Title:

STATE BOARD

☐ Approved

Date Action Taken:

☐ Denied

Date Action Taken:

*SELPA Administrator need not sign for substitute teacher extension requests.

Narrative Summary:

The State Board is being asked to waive (modify) Education Code Section 56364.1 to allow other severely handicapped students, beyond those defined as having low incidence disabilities, to receive all or a portion of their instruction in the regular classroom while also being enrolled in and supported by special day class levels of staffing and funding.

Proposed Plan and Justification:

The Lassen County SELPA has a long and positive history of providing special education services to students in the least restrictive environment. In most cases this means services are provided to students in their home school. Transportation to other school sites is only considered when the program at another site is determined by the IEP team to be the appropriate placement.

In addition, the Lassen County SELPA has promoted the regular involvement of special education students with their peers. Very few student have been determined by IEP teams as having needs that prevent some involvement each day with their non-handicapped peers.

Not only have these practices made sense to us educationally, but they have been forced upon us by the sparse, rural nature of our county. Lassen County covers almost 5,000 square miles and this past year our K-12 CBEDS count (10/89) was 5,076, giving us approximately 1 student per square mile. The state has used 15 or less students per square mile to determine a county as being sparse. These figures make us the sixth sparsest county in the state. These realities require us to provide services in different ways than less sparse areas.

In many cases it is impractical to transport students to programs other than those offered at their home school. In some of our districts, students travel on district busses up to an hour, and sometimes more, just to get to their school of residence. To consider the additional travel to the next closest appropriate school or program is inappropriate.

Over the past years, since the introduction of the P.L. 94-142 and the state Master Plan for Special Education, Lassen County has moved, with support from the State Department of Education, to the point that we now have special education services being provided at each of the school sites within Lassen County.

The staff hired to provide services at these sites recognize that they will serve a wide variety of students. The variety includes grade, handicapping condition, and length of the day that services are needed. It would not be unusual for a single special education teacher to serve learning disabled, mentally retarded, speech impaired, severely handicapped, RSP, and SDC students in a range from kindergarten through eighth grade. The total class numbers would be lower, but the mix and range of student needs is extremely challenging.

The issues that have been presented also impact the regular education program. Severely handicapped students who in other parts of the state would likely be placed in separate, isolated classrooms are all on regular campuses, in Lassen County, usually at their home school.

Because of our sparsity issues, most severely handicapped students have naturally been a part of regular education activities to some extent. While problems have existed in the level of acceptance of the severely handicapped, overall we have found a generally high level of acceptance for those with severe handicaps within our communities. From an educational leadership perspective, we are trying to promote opportunities for the handicapped and non-handicapped to learn and grow together. This is founded on the belief that these guided opportunities will better allow handicapped and non-handicapped adults to deal with the adult world together.

Mainstreaming is a term that has been used to describe the part of the school day that special education students spend in regular classroom activities. Only a handful of special education students in Lassen County do not spend some portion of their day in regular education activities. In 1986, the California School Boards Association recognized the efforts Lassen County has made in this area by awarding us their First Place "Golden Bell Award".

In 1988 we applied for and were accepted into the State sponsored PEERS (Providing Education for Everyone in Regular Schools) Program. Our history and support in the area of integration allowed us to be one of the first SELPA's to participate in this project. We have held monthly PEERS meetings during the school year since the Fall of 1988. During our year of involvement in the PEERS project we gathered supportive information to backup our previously established trend of promoting opportunities for the handicapped and non-handicapped to learn and grow together.

We have continued to educate ourselves in this area. We have reviewed massive amounts of research and literature on the topic of integration, and in the summer of 1989 a team of eight staff from our SELPA attended a week-long summer institute workshop on the topic of integration. The team included regular and special education teachers, school psychologists, speech therapists, and administrators. Long term planning that occurred as an outgrowth of our activities in this area included staff development, grant writing, policy review, and careful self-examination at the site level, of ways in which integration activities could be enhanced and promoted.

Staff development activities have taken place at county, district, and site levels. We have participated in state and national level conferences on integration. Staff have made visitations to other sites involved in integration in Northern California. We have had individuals involved in integration efforts visit us. We have involved parents and our Community Advisory Committee (CAC), in addition to our administrators and Boards.

In cooperation with the State Department of Education, we participated in the writing of a Federal grant, which if approved, would provide for the hiring of an integration specialist who would work within two SELPA's to support and examine the integration efforts. This would provide additional information for long-range planning at the State and local levels. We have not yet heard whether our grant has been approved.

As an outgrowth of all of these activities, different school sites within our SELPA have made changes in the level of effort involved in integration activities. While a few sites are not interested in being involved in integration, several have been actively involved.

At McKinley School, the specific site for which this waiver is being sought, the bulk of the individuals attending the Summer Institute in 1989 came from this school. Both district and county employees were involved, as both district and county-operated programs are at the McKinley School site.

During the 1989-90 school year, we began working with the total school staff. Staff development activities took place. Staff meetings were held, along with alot of staff discussion around the school. While not all of the staff were interested in being involved, the consensus was that they were willing to look at and try increased integration activities for the severely handicapped students. Over the 1989-90 school year on an individual basis, IEP meetings were held on selected students to discuss the appropriateness of increased integration activities. Individual regular classroom teachers willing to be involved in the integration activities were involved in IEP meetings.

In the case of a small number of severely handicapped students (5), IEP team decisions were made to involve the students in regular classroom programs, with support from the special education program. Individual planning team meetings were held as often as needed (weekly at first), to support the regular classroom teacher and monitor the progress of the student. Additional support was provided by the special day class teacher and instructional assistants.

Observation indicated that, while there were problems, the overall belief of the teachers and parents involved was that these efforts were not only beneficial to the handicapped and non-handicapped students, but they were also philosophically correct. In the Spring of 1990, the staff and parents were surveyed to gather their input regarding the direction of the integration efforts (survey results are attached). The consensus of the staff was to continue the integration efforts as long as the appropriate levels of support can be provided.

In order to move forward, we also need the support of the State Board in the approval of this waiver. This waiver would allow the Susanville Elementary and the Lassen County Superintendent of Schools Office to cooperatively support the implementation of integration at McKinley School during the 1990-91 school year.

We are respectfully asking that Education Code Section 56364.1 be modified under this waiver. 56364.1 states: "Notwithstanding the provisions of Section 56364, pupils with low incidence disabilities may receive all or a portion of their instruction in the regular classroom and may also be enrolled in special classes taught by appropriately credentialed teachers who serve these pupils at one or more school sites. The instruction shall be provided in a manner which is consistent with the quidelines adopted pursuant to Section 56136 and in accordance with the individualized education program."

We would promote that, due to the sparse nature of our community, severely handicapped students are in fact so few in number that they are in essence a low incidence disability within the SELPA. If approved, this waiver would allow us to expand our program service options at McKinley

School to include an integration option, supported by special class staffing and funding. We would continue to provide the opportunity for designated instruction and services (DIS), resource specialist program (RSP), and special day class (SDC) placements at McKinley School, when found to be appropriate by the IEP team. The continued funding at the special day class level is critical to the provision of support for students integrated into regular programs. With the approval of the State Board, the staffing and programs would be present to allow for this continuum of services.

IEP team meetings have concluded that parents and school staff support increased numbers of integrated severely handicapped students for the 1990-91 school year. In order to make the program changes that would support such an effort, our first step is to seek the support of the State Board.

A key element of this waiver request is that, as students move into regular classroom integrated placements, their IEP's would no longer reflect SDC placements. As the numbers of severely handicapped students' IEP's change to other than SDC, our responsibility would be to report to the state through the J-50 process that the program is no longer SDC-SH. This would require a reduced level of funding, penalizing us and preventing us from utilizing the SDC-SH level of funding to provide the support necessary for the severely handicapped students to have appropriate and successful integration experiences.

Upon receiving approval of this waiver request, we would continue to consider existing special day classes at McKinley as special day classes for purposes of state reporting, but the majority of the severely handicapped students currently in that setting would be anticipated to spend a majority, if not all of their day, in regular class integrated placements. Student IEP's would reflect non-SDC placements, as appropriate, and student A.D.A would be received by the regular education program per the October 15, 1986 letter on this issue (copy attached).

It is hoped that this narrative has given you the sense that this request is a natural, developmental step for special education services in our area and not something that has come about as a result of quick or pressured efforts. We ask for your support and we will be happy to provide additional information or to respond to any questions, in person or writing, that you might desire. Thank you for your consideration.

§ 56364.1. Instruction for Pupils with Low Incidence Disabilities

Notwithstanding the provsions of Section 56364, pupils with low incidence disabilities may receive all or a portion of their instruction in the regular classroom and may also be enrolled in special classes taught by appropriately credentialed teachers who serve these pupils at one or more school sites. The instruction shall be provided in a manner which is consistent with the guidelines adopted pursuant to Section 56136 and in accordance with the individualized education program.

Added 1982 Laws, Ch. 1334. Effective 1-1-83.

§ 56364.5 Standards for Credentials on Permits: Employees of Special Centers

The Commission on Teacher Credentialing shall establish standards for the issuance of credentials or permits for persons employed in special centers pursuant to Section 56364.

Amended 1987 Laws, Ch. 1452. Effective 1-1-88.

§ 56365. Nonpublic, Nonsectarian School Services

(a) Nonpublic, nonsectarian school services, including services by nonpublic, nonsectarian agencies shall be available. The services shall be provided under contract with the district, special education local plan area, or county office to provide the appropriate special education facilities or services required by the individual with exceptional needs when no appropriate public education program is available.

(b) Pupils enrolled in nonpublic, nonsectarian schools under this section shall be deemed to be enrolled in public schools for all purposes of Chapter 4 (commencing with Section 41600) of Part 24 and Section 42238. The district, special education local plan area, or county office shall be eligible to receive allowances under Chapter 7 (commencing with Section 56700) for services that are provided to individuals with exceptional needs pursuant to the contract.

(c) The district, special education local plan area, or county office shall pay to the non public, nonsectarian school the full amount of the tuition for individuals with exceptional needs that are enrolled in programs provided by the nonpublic, nonsectarian school pursuant to such contract.

Appendix L

Implementation Sites Sample

PEERS

Providing Education for Everyone in Regular Schools

PROJECT DIRECTOR
Patrick Campbell, Asst. Superintendent/Dir.
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 323-4768

REGIONAL OFFICES
Tom Neary
650 Howe Avenue, Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D
Ed. Psychology Dept
CSU, Hayward
Hayward, CA 94542
(415) 881-3087 or 338-7849

Lynn Smithey
El Toro HS, Rm. 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8558

Steve Johnson, Consultant
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 323-4871

PEERS PROJECT

INCLUSIVE EDUCATION

SITES SAMPLE

Ann Halvorsen
Tom Neary
PEERS Coordinators
Fall, 1992

1274

Peers Project
Fall 1992

I. Rural Programs

A. **Lassen County**: Michael Justice, Special Education Local Plan Area (SELPA) Director (916) 257-2196

- Structure and Staffing of Model: County office of education operates inclusion program collaboratively with the district in Susanville, a town in the Sierras. Twenty-two elementary aged students with moderate to severe disabilities are currently involved at McKinley School. When the second elementary school is completed, about half of the students will go to this new home school and be included there. A waiver of one Education Code section was applied for and approved by the State Board of Education so that staff and funds typically allotted for special education classes (teacher and 1 - 2 paraprofessionals) can be utilized in an itinerant manner within general education. There are no isolated sites or centers in Lassen County.

B. **Colusa County**: Debra Owens, SELPA Director, (916) 458-8891

Structure of Model - This rural county in North Central California has several towns: Colusa, Williams, Maxwell, Pierce and Arbuckle. Currently within Colusa Pierce and Williams the inclusive programs are: 1) a collaborative preschool program with a public preschool (CDC)attended by disabled and nondisabled students and team taught by general/ special preschool educators, 2) elementary schools serving students within their age and grade - appropriate classes in their respective home schools, 3) one middle and one high school program with students in their age and grade appropriate classes with additional instructional program time in the community and at integrated vocational training sites. There are no isolated sites or centers in Colusa County.

- Staffing: Colusa County Office of education also operates this model in collaboration with the local districts, for approximately 25 students across age levels. Teachers are encouraged to obtain dual credentials (e.g. LH/ SH as well as the state required general education credentials) so that they feel competent to provide support services to a non-categorical mix of students at the home school. The SELPA also obtained a waiver in order to support students in general education classes. The SELPA reports that inclusive education is operating at no greater cost over a special class model.

- Background and structure: Santa Rosa is a small city (student enrollment about 10,000) in the Sonoma Valley, and Old Adobe, in the nearby town of Petaluma, has a K-12 enrollment of about 2200. Traditionally, the Sonoma County Office of Education has operated the majority of integrated and center-based programs for students with severe disabilities. Following a SELPA - wide task force on inclusion and integrated options in 1991 and 1992, Santa Rosa was approved to initiate the first inclusive program in September, 1992, operated by the district. An itinerant special education teacher with support provides assistance to students in four home schools. The program also converted one "unit" into aide support (3). A curriculum adaptation manual, based on reviews of the literature, and a county-wide survey of adaptation practices, is in development by the itinerant teacher, Susan Mark - Raymond, and Linda Patterson, a Preschool Program Specialist with the SELPA.

III. Urban Programs:

A. **Oakland Unified School District**: Steve Morford, Director of Special Education, (510) 836-8223.
Alternative contact: Lynne Ono, Elementary Program Manager, (510) 836-8226. Rookie Hirsch, Preschool Program Manager, (510) 836-8221

- Background: Oakland is a large urban district across the Bay from San Francisco, with about 100 schools. Until Fall, 1988, all students with moderate to severe disabilities were served in one of three special centers. Two of these have been closed in the past two years; the third has several elementary classes in it and is administered by the elementary principal in the adjacent school. There are more than 50 integrated programs for students from preschool through transition age. The public Child Development Center preschool program for financially eligible students has had multiple integrated and team taught sites for two years; Headstart and the district have initiated inclusion programs this past year, and there are three schools with integrated team-taught kindergartens. In addition, elementary and middle school inclusive education began in 1991.

- Structure: One elementary school (Allendale Year Round) which has one of the team - taught kindergarten programs, expanded to include kindergarten-3rd grade students in 1991. Students now attend their grade and age - appropriate classes in the school with support from a teacher and two aides, and with expansion to fourth grade this year. The district has also initiated an inclusive education task force.

II. Suburban

A. Davis U.S.D./ Yolo County Office of Education: Linda Brooks, Support Teacher, 3 elementary schools; No. Davis, W. Davis, Valley Oak.

- Structure and Staffing: Davis is a university community near Sacramento, whose school - age students with severe disabilities had attended a segregated center in another town until 1989. Ten Davis students now attend their three respective home schools and are served in age and grade - appropriate kindergartens - sixth grades. Three staff (teacher and two paraprofessionals) work in an itinerant manner (under a waiver) among the various classes, providing support services such as curriculum adaptation, facilitating instruction, teaching groups, etc. Davis also has a university preschool which fully includes students who experience disabilities.

B. Napa Unified School District: Nancy Reinke, Program Administrator (707) 253-3561.

- Structure and Staffing: The rural/ suburban community of Napa has no isolated sites; all students attend district schools. In 1991, an inclusive model was initiated which involved a team - taught morning kindergarten in one school (24 general education and four students with special needs) and additional 1st - 5th grade students in other home schools. The program currently serves a total of eight home schools and 20 students The appropriate waivers were also obtained. Napa U.S. D. is very interested in coordinating their inclusion efforts with the current restructuring/ general education focus in the district, and potential state grants to support these efforts. Presently, the inclusive program is operating at the same cost as a special class program, using both an initerant service delivery model like Davis, as well as resource and special class support.

C. San Lorenzo Valley U.S.D: Catherine Gallegos, Director of Special Education, (408)335-4717

- Structure: The Santa Cruz County Office of Education operates this program collaboratively with the district in this mountain community north of Santa Cruz. Two elementary schools are now serving eight students from kindergarten through third grade, with one teacher and three paraprofessionals.

D. Santa Rosa City Schools and Old Adobe (Petaluma) School Districts John Namkung, Director of Special Services, Santa Rosa, (707)528-5322.

Appendix M

Inclusive Education Site Listing

Providing Education for Everyone in Regular Schools

PEERS

PROJECT DIRECTOR

Patrick Campbell, Asst. Superintendent/Div
California Department of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 323-4768

REGIONAL OFFICES

Tom Neary
650 Howe Avenue, Suite 300
Sacramento, CA 95825
(916) 641-5930
(916) 641-5871 FAX

Ann T. Halvorsen, Ed. D
Ed. Psychology Dept.
CSU, Hayward
Hayward, CA 94542
(415) 881-3087 or 338-7849

Lynn Smithey
El Toro HS, Rm. 902
25255 Toledo Way
El Toro, CA 92630
(714) 837-8558

Steve Johnson, Consultant
California Dept. of Education
P.O. Box 944272
Sacramento, CA 94244-2720
(916) 323-4871

PEERS Project
Full Inclusion sites
January 1992

The participation of students with severe disabilities full time in general education classrooms is increasing throughout the nation and in California. Many of these sites were developed through the PEERS Project, a five year, federally funded systems change project designed to assist Special Education Local Planning Areas and Local Educational Agencies in creating new integrated options.

There appear to be two models in place to support inclusion. Both use the same funding mechanism and have in general the same ratio of staff to students.

In the **Itinerant** model, all students on the special education teacher's caseload are included full time in their age and grade appropriate regular classes in their home schools in natural proportion (approximately 1% of non-disabled population). No separate classroom exists for these students. Since students are in home schools, there tends to be heterogeneity in these programs.

In the **special day class** model, which may not be the student's home school, some of the students on the special education teacher's case load are in regular education classrooms full time and others are integrated for portions of the school day. Since students have historically been clustered according to ability level in special day classes, these programs tend to be more homogeneous.
The staffing pattern shown for special day class models indicates the total number of students and staff for the special day class. Those same staff are providing support for the students who are fully included (noted under # included). The included students are part of the special day class count for funding purposes but are included in regular education classes fully.

This information was gathered by examining integrated options developed as part of the PEERS Project. Project staff include three regional coordinators respsponsible for working with SELPAs and Local Educational Agencies. These new options are reported as part of the annual reporting process for federally funded projects. In addition, PEERS staff informally contacted other grant projects in the state involved with integration, LEA staff and university faculty interested in integration in California. Those SELPAs/LEAs with an asterisk (*) are directly involved with PEERS. The others listed were developed by local educational agencies to meet needs within their agency.

The following California school sites are currently including students with severe disabilities full time in age-appropriate general education classrooms. This list is not exhaustive, but reflects sites PEERS is aware of or that are in districts with which PEERS has worked.

SELPA/Dist.	School Site(s)	# students included	Staffing pattern	Contact
•Colusa County	Williams Elementary	15 total	Itinerant	Debra Owens, Director (916-458-8891)
		8- SH	1 SH Teacher 2 aides	Anthony Katsaris, Principal (916-473-2885)
		7-RSP/LH	.5-FTE RSP teacher	Kim Morris, Teacher (916-473-2885)
	Burchfield Elementary	1-SH	Itinerant 1 SH Teacher 2 aides	Ed Conrado, Principal (916-458-7631)
	Egling Middle	3-SH		Jim Lutz, Principal (916-458-2156)
	Colusa High School	3-SH		
	Kids Country Preschool	11-SH/LH	1 SH Teacher 2 aides	Molly Peterson, Teacher (916-473-2777)
•Yolo County	Valley Oak Elementary	3-SH	Itinerant	Nona Kirk, SELPA Admin. (916-661-2935)
	West Davis Elementary	4-SH	1 SH Teacher 2 aides	Linda Brooks, Teacher (757-5490)
	North Davis Elementary	3-SH		

SELPA/Dist.	School Site(s)	# students included	Staffing pattern	Contact
*Lassen County	McKinley Elementary	6-LH; 4-SH	Itinerant 1 SH Teacher 4 aides	David Burriel, Principal (916-257-5161)
	Meadowview Elem. (under construction)	9-LH; 1 SH	Itinerant 1SH Teacher 3 aides	David Burriel (916-257-5161)
Santa Cruz County San Lorenzo Valley USD	Quail Hollow Elem. San Lorenzo Valley	4-SH 2-SH	Itinerant 1 SH Teacher 2 aides	Catherine Gallegos, Director (408-335-4717) Martine Zaun, Teacher (408-336-5193)
Pajaro Valley	Ohlone Elementary	7-SH	Itinerant 1 SH Teacher 2 aides	Robin Tsuji, Teacher (408-335-4475)

SELPA/Dist	School Site(s)	# students included	Staffing pattern	Contact
*North Coastal SELPA Encinitas Union	La Costa Heights	1-SH	Special day class 1 Teacher for 9 2 FTE aides	Sue Sporl, Teacher Emily Andrade, Principal (619-944-4375)
	Mission Estancia Elem.	4- SH	Special day class 2 Teachers for 14 2 aides	Jennifer Fleming, Teacher Tim Reeves (619-943-2004)
*San Diego USD	Muirlands Jr. High Hearst Elementary Bird Rock Elementary	2- SH 1-SH 1-SH	Itinerant 1 SH Teacher 3 part time aides	Linda Alexander, Teacher (619-459-4211)
	Penn Elementary	2-SH	Special day class 1 SH Teacher for 11 1- 7 hour aide 2-5 hour aides	Colleen Morichise, Teacher (619-479-3065)
	Lafayette Elementary	3-SH	Special day class support	Kim Jubala, Teacher 619-496-8160
	Fletcher Elementary	2-SH	RSP/SDC support	Peggy Roland, Teacher 619-496-8105

SELPA/Dist	School Site(s)	# students included	Staffing pattern	Contact
Berkeley USD	John Muir Elementary	9- SH	Itinerant 1 SH Teacher 2 aides	Lauri Triulzi, Teacher (510-644-6406)
	Arts Magnet School	1-SH	1 aide	Morgen Alwell, Teacher (510-644-6406)
•Oakland USD	Allendale Elementary	5-SH	Itinerant 1 SH Teacher 2 aides	Lynne Ono, Program Mgr. (510-836-8220) Kelly McGrath, Teacher (510-532-6080)
	Claremont Middle	2-SH	Special day class 1 Teacher supports 10 2 aides	Judy Looby, Teacher (510-652-3931) Joanna Lugent, Prog. Specialist (510-836-8220)
Livermore Valley	Christiansen Elem.	3-SH	Special day class 1 Teacher supports 7 3 aides	Corinne Agurkis, Teacher (510-443-5801)
		4- SH	Special day class 1 Teacher supports 10 3 aides	Lisa Celniker Burkhart (510-443-5801)

SELPA/Dist	School Site(s)	# students included	Staffing pattern	Contact
Chula Vista Elem.	Allen Elementary	2-SH	Special day class 1 Teacher supports 10 2 aides	Suzanne Gilbert, Teacher Peter Matz, Principal (619-479-3662)
San Leandro USD	McKinley Elem.	9-SH	Special day class 1 Teacher supports 2 aides	Becky McNeese, Teacher (510-483-4821) Russ Peterson, Principal (510-667-3582)
Sacramento County Galt USD	Valley Oaks Elem.	1-SH	Special day class 1 Teacher supports 10 2 aides	Virginia Scott, Teacher (209-745-5415)
		4-preschool SH	Special day class 1 Teacher supports 10 2 aides	Lisa Lundholm, Teacher (209-745-5414)
Ukiah USD	Oak Manor Elem.	5-SH	Itinerant 1 SH Teacher 2- 6 hour aides 1- 3 3/4 hour aide	Damon Dickenson, Director (707-463-5213) Marilyn Boulanger, Principal (707-463-5249) Deanna Wilson-Schafer (707-463-5271)

SELPA/Dist	School Site(s)	# students included	Staffing pattern	Contact
Ukiah USD	Hopland Elem.	3- SH	1- 6 hour aide 1- 3 3/4 hour aide	Gloria Jarrell, Principal (707-744-1333) Deanna Wilson-Schafer
	Calpella Elem.	5- SH	Special day class 1 Teacher supports 8 2.5 aides	Barbara Hopper, Principal Kris Rogers, Teacher 707-485-5896
	Frank Zeek Elem.	6- SH	Special day class 1 Teacher supports 10 2.5 aides	Carl Morgensen, Principal Jone Duggan, Teacher 707-463-5245
	Pomolita Middle	4- SH	Special day class 1 Teacher supports 8 2.5 aides	Mike Lauretta, Principal Pat Pollitt, Teacher 707-463-5224
Cabrillo USD	El Grande Elem. Hatch Elementary	1- SH 1- SH	Itinerant 1 SH Teacher 2 SH and 12 RSP 2- aides	Linda Sousa, Teacher (415-712-7160)
*Napa Valley USD	Shearer Elementary Salvador Elementary	2- SH 3- SH	Itinerant 1 SH Teacher 2 aides	Pam Schmidt, Teacher (707-253-3508) Nancy Reinke, Prog. Admin. (707-253-6865)

SELPA/Dist	School Site(s)	# students included	Staffing pattern	Contact
Cajon Valley Elementary Dist.	Rancho San Diego	3-SH	Special day class 1 Teacher supports 11 1.5 FTE aides	Linda Choy, Teacher (619-588-3215)
	Cuyamaca Elem.	1-SH	RSP/SDC support	Susan Bennett, Teacher 619-588-3187
North Orange County/Fullerton	Laguna Road	1-SH	Itinerant support 3.5 hour aide	Karin Lynch, Ed.D Assist. Supt. 714-447-7450
	Rolling Hills	1-SH	Itinerant support 3 hour aide	Karin Lynch, Ed.D
	Pacific Drive	1-SH	Itinerant support 3 hour aide	Karin Lynch, Ed.D
	Richman	1-SH	Itinerant support 5 hour aide	Karin Lynch, Ed.D
	Woodcrest	9-SH 3 Kindergarten classrooms	Itinerant support 1 Teacher 1 aide	Mrs. Judith Gibbs, Principal 714-447-7760

SELPA/Dist	School Site(s)	# students included	Staffing pattern	Contact
Saddleback Valley USD	Santiago	1-SH	RSP case manager 1.5 hour aide	Jim Hamilton, Director 714-586-1234

Appendix N

Halvorsen, A. & Sailor, W. (1990)

CALIFORNIA RESEARCH INSTITUTE
ON THE INTEGRATION OF STUDENTS WITH SEVERE DISABILITIES

SAN FRANCISCO STATE UNIVERSITY 14 TAPIA DRIVE SAN FRANCISCO, CALIFORNIA 94132 415-338-7847 415-338-7848

BEST COPY AVAILABLE

INTEGRATION OF STUDENTS WITH SEVERE AND PROFOUND DISABILITIES: A REVIEW OF RESEARCH

Ann Halvorsen*
PEERS Project
California State University, Hayward

Wayne Sailor
California Research Institute
San Francisco State University

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* *Dr. Halvorsen is the Integration Training Coordinator of PEERS, California's Statewide Systems Change Project. This chapter was developed with support from G0087C3058.*

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CHAPTER 3

Integration of Students with Severe and Profound Disabilities: A Review of Research

ANN T. HALVORSEN
WAYNE SAILOR

> From where she was to where she is now is phenomenal. When she started into the educational system she was extremely spastic, she made no meaningful movements. She was tube-fed, she was deep-suctioned. . . . She gave no indication of being aware of her environment. Her expression, her demeanor, everything was the same no matter what she was doing. She actually seemed even semicomatose a perfect candidate to overprotect. Also a perfect candidate to set artificial barriers for—mental barriers that we set for these kids: "She doesn't even know where she is: how can we improve her quality of life when she doesn't show any indication that she knows where she is?" When we place these artificial barriers there we make them self-fulfilling prophecies. They said, "Let her die" after her accident: "She'll be a vegetable; she'll never know the difference; why ruin three lives for the benefit of one who's never going to do anything anyway?" Then they said to put her in the state hospital. . . . When we brought her home from the hospital the back of her head was touching her buttocks; that's how she was neurologically postured. . . . Our barriers were identified for us: "She won't go any further so what are you worrying about? Get on with your lives and forget about it." But early on we learned that we don't decide what she'll accomplish or what she won't accomplish. We have to provide

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Errata:
p 122 Heading missing (after #10 Administrative Issues)
p 132 #5 Extent and Degree of Personnel Training should be inserted above the eighth item.

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> *her* with every opportunity to show *us* what she can accomplish. . . . If they're not on an integrated school site, you're taking away those opportunities to break down those barriers. . . . Now, she moves, she's totally flexible, she gets herself sitting up; she's starting to pull herself in a kind of a crawl; she can stand up, she sits in a wheelchair. She gets herself moving around in a wheelchair; she feeds herself with a spoon, she says a few words, she smiles when she's happy, she's aware, she has a personality. I mean, we've gone so far *beyond* the *optimum* quality of life that was identified for her to us that you can't even talk about it. Integrated opportunities have been a major part of that ongoing growth. When they're educated in their own communities they are a part of their community—when they're educated outside of that community, they become invisible members of the community.
>
> —Excerpts from a talk by Don Vesey, parent (1986)

Burton Blatt (1985) asserts that to continue to ask whether integration is a good idea is to ask the wrong question; rather, that the question to be investigated when examining integrated environments for students with disabilities is: How do we make integration work? Baer (1986), in his review of a contemporary volume on exemplary service strategies for severely disabled students, cautions us to give serious empirical attention to our definitions of "what works well," that is, to both the outcomes of these interventions and to the social validity of the interventions themselves. Social validity in this sense refers to whether these outcomes are considered valuable and meaningful by the affected consumers: students, parents, and community members such as potential employers (cf. Voeltz, Wuerch, & Bockout, 1982).

In this chapter we shall focus on existing research and on various published positions that form the background for integration for students with severe and profound disabilities, including investigations of factors that predict access to integrated opportunities; outcomes associated with integration; and validated, "best practice" strategies to facilitate these outcomes.

WHO ARE STUDENTS WITH SEVERE AND PROFOUND DISABILITIES?

In a book of this nature, which deals with research relating to the full spectrum of students participating in special education programs, it is important to define the particular population of interest here, even though as Pumpian, West, and Shephard (1988) have noted, such definitions can be dangerous. Labels are dangerous when they lead to overgeneralization about a group of individuals when, in fact, these individuals are extremely diverse in their needs and strengths. Students who experience severe and profound disabilities have been variously described as "severely handicapped," "severely/profoundly handicapped," "severely intellectually impaired," and "multiply handicapped." In the past, homogeneous models of classification led to further labeling of separate groupings within the service categories such as "students with autism," "trainable mentally retarded students," "deaf-blind students," etc. The field is progressing towards heterogeneous or less categorical groupings of all special education students; here, when we speak of severely and profoundly disabled individuals, we are referring to people who experience the most significant developmental delays. These individuals may have one or more additional disabilities (sensory, physical, or emotional) besides severe functional retardation. At the same time, there is a broad range and diversity within the population. No student would be considered so disabled as not to be included in the population, regardless of medical fragility, minimal communication skills, or lack of consistent motor responses (Sailor, Goetz, Anderson, Hunt, & Gee, 1988). However, some students might acquire a sufficient repertoire of expressive and academic skills to "graduate out" of the population of interest here.

Finally, Sailor, Gee, Goetz, and Graham (1988), in reviewing research literature on the most severely disabled students, argued for a return to the inclusion of the term "profound" when addressing issues or conducting research inclusive of that particular subgroup of the population of students with severe disabilities. Most of the available research literature on best practices appears not to have addressed the most severely disabled population. In this chapter, where there are indications that the research literature on integration pertains to the most disabled students (including "medically fragile," "multiply handicapped," "deaf-blind with profound retardation," etc.) as well as the larger population that has historically been addressed as "severely handicapped," then the term "profound" will be used to indicate that evidence in the review and discussion.

WHAT IS INTEGRATION?

Educational integration of severely disabled students with their nondisabled age peers is a complex, dynamic phenomenon, not a unitary concept, involving far more than the mere placement of students in regular education settings (cf. Wilcox, 1986). Sailor, Anderson, Halvorsen, Filler, and Goetz (1989) have conceptualized it as having each student participate as a valued member of a *sustained social network within his or her home community.* This process is accomplished through a range of interventions designed to promote functional competence within and across integrated contexts, characterized by successful ongoing interactions with nondisabled peers. Toward these ends, these authors have proposed the *comprehensive local school model* of integrated service delivery, which encompasses several critical integration markers:

1. All students are served in the *age-appropriate school* that they would attend if they were nondisabled. This means that if regular education, secondary-age students attend their neighborhood high school, then students with severe disabilities aged 15–18 should attend this same school. In many communities, because of racial desegregation programs or the rural nature of an area, regular education students may be bused out of their immediate neighborhood, or may travel to more centrally located schools. These exceptions to the neighborhood school would apply to the severely disabled student as well. The important feature of this marker is that—regardless of where the school is located—it serves both the disabled and nondisabled students who reside in a particular area, so that relationships that develop in school may be extended to nonschool, extracurricular environments and activities.
2. A specific *single-site administrator* or principal is responsible for all comprehensive local school services. He or she may receive technical assistance, inservice, or consultation from special education administrative personnel; however, the site administrator runs all programs on a day-to-day basis, including evaluation of special education staff. In other words, the same professional practices are utilized for the special education program as for the regular education program.
3. The severely and profoundly disabled students in integrated and/or mainstreamed programs at the school should represent the *natural proportion* (Brown et al., 1983) of severely disabled to nondisabled students in the population of the community at large, which is generally estimated to be 1% to a maximum of 5%.
4. *Related services* (e.g., occupational, physical and speech therapy, adaptive physical education and transportation) should be delivered in an integrated manner; that is, therapy services are provided in natural instructional environments in the school and community rather than in "pull-out" programs (Nietupski, Schutz, & Ockwood, 1980), and students travel to and from school utilizing the same methods of transit (school bus, public bus, walking) as their nondisabled peers. (Thus, regular school buses should become accessible to students who use wheelchairs.)

These four markers represent the minimum setting events for educational integration within the comprehensive local school. Before our analysis of the available research on integration outcomes and strategies, we shall examine some traditional educational service delivery models for severely disabled students, and some of the forces that combined to bring about the current strong trend toward less restrictive opportunities for this population.

HISTORICAL BACKGROUND

Brown et al. (1983) and more recently Meyer and Putnam (1987) have outlined several phases in the progression of service delivery for children and youth who experience severe disabilities. Reynolds and Birch (1982) have characterized this evolution of services as a trend toward "progressive inclusion." These overlapping stages include:

No Schools

The first period evidenced a lack of educational opportunities, when individuals were assumed to be "ineducable" or unable to benefit from education and thus not entitled to these services (Scheerenberger, 1983). Although this period is generally considered to have ended early in this century, it is important to note that the attitudinal legacy from this period, that is, the "educability" debate, has lingered into the 1980s among some professionals in the field (Burton & Hirshoren, 1979; Goldberg & Cruickshank, 1958; Tawney & Smith, 1981; see also Stainback & Stainback, 1983), despite an ever-expanding body of literature demonstrating student skill acquisition under educational programs for this population.

Residential Schools

These schools typified the second stage (early to mid-1800s) of service development, and were seen as part of a reform movement to bring education as well as training to persons of different disabilities, and thus to bring about more positive treatment of these individuals. However, by the late 1800s, these "schools" were evolving into massive public institutions, whose focus had changed from the original intent of "making deviant individuals undeviant" (Wolfensberger, 1975), to one of "protecting" persons with disabilities from the outside world (e.g., Kerlin, 1884, in Wolfensberger, 1975). This change appears to have occurred as a result of several interactive forces. Originally, when institutions were designed to fulfill an educational need, compulsory education did not exist, and free public education for nondisabled students was in its infancy. As the public educational system developed and began to take responsibility for "ungraded classes" for mildly disabled students in the early 1900s (Kanner, 1964; Wallin, 1955), the training function of residential schools diminished, hastening their movement toward custodial care. In turn, as the higher functioning student was provided for within the public schools, parents of these students saw less reason to place or institutionalize their children. Thus, the more severely disabled population became the more prevalent group within our nation's institutions. Instructional technology for this population was virtually nonexistent at this time, resulting in characterizations of these individuals as "unimprovables" (Kerlin, 1885, in Wolfensberger, 1975). State hospitals, in turn, shifted their focus further away from their educational goals. Wolfensberger has conceptualized the institutional trend in this period as one of "protecting nondeviant individuals from deviant people" (1975, p. 33). This segregationist period was stimulated by the development of the eugenics movement's belief in the heritability of retardation and the resultant social policy of isolating disabled persons, with the intention of preventing population growth (Fernald, 1915, in Wolfensberger).

Segregated Private and Public Schools

Significant change in the form of development of community services and initiation of public and private school programs for individuals with severe disabilities did not occur until the postwar period of the late 1940s and early 1950s. Wolfensberger (1975) hypothesized that two reasons for the perpetuation of the status quo were the Great Depression of the 1930s, which inhibited progress in all but the "essential" social services, and both world wars, only after which did we experience what Burello and Sage (1979) have characterized as a "liberalization of attitudes toward human variance" (p. 34). They point out that although the depression delayed societal focus on disabled persons, it had lasting effects on attitudes toward government intervention and support, coupled with new recognition of rights versus privileges. In addition, the return of permanently disabled servicemen from both World War II and the Korean War, and concurrent rehabilitation efforts on their behalf, facilitated positive attitude change toward disability in general.

Despite the growth of public and private special education classes in the 1940s and 1950s, these options were not generally extended to the more severely multiply disabled student until the 1960s. Much of the advocacy for and development of these programs was brought about by parent-founded organizations, such as the National Association for Retarded Citizens, United Cerebral Palsy, and others. The growth of these segregated placements continued after the passage of Public Law 94-142 (1975), which was unexpectedly interpreted by some as a mandate to "establish new and expand old segregated public schools" (Brown et al., 1983, p. 72).

However, it is fair to say that a great many parents, educators, and advocates disagreed with this interpretation on a number of bases and, using a variety of educational, legal, ethical, and political arguments, provided the impetus for the *integration movement*, i.e., the location of students in chronologically age-appropriate regular school programs.

Legal and Ethical Bases for Integration

The civil right of severely disabled individuals to a free, appropriate public education in integrated environments has been supported both by legislation and litigation. Turnbull (1986) has described the derivation of the principle of the *least restrictive environment* (LRE), one of the six major principles of PL 94-142 (1975), as stemming from the constitutionally based legal doctrine of the least restrictive alternative: that legitimate government activities (e.g., education) may not be pursued through means that stifle personal liberties when these purposes can be achieved by less restrictive means. Procedural due process, substantive due process, and equal protection are the three constitutional principles supporting the least restrictive alternative, and these constitutional protections have been applied by the judicial system in numerous cases bearing upon an individual's right to education with his or her nondisabled peers. (See Laski, 1985; Martin, 1986, for reviews.) The finding of the Supreme Court on racial segregation in *Brown v. Board of Education* (1954), that the doctrine of "separate but equal" has no place in public education, has been applied to individuals with severe disabilities in landmark cases, such as *Pennsylvania Association for Retarded Citizens (PARC) v. Commonwealth of Pennsylvania* (1971), where the court found that "placement in a regular public school class is preferable to placement in a special public school class, and placement in a separate public school class is preferable to placement in any other type of program of education and training" (344 F. Supp. 1257). In 1982, the court further stated that programs for severely disabled students must be provided "in age-appropriate schools attended also by nonhandicapped students in natural proportions" (*PARC v. Pennsylvania*, Consent Decree, 1982, p. 2).

Educational Bases

The finding of preference for regular education environments also characterizes the viewpoint of many educators and families in the late 1960s and early 1970s, when the effectiveness of special education in general came under fire (cf. Christopolos & Reny, 1969; Dunn, 1968; Lilly, 1970), particularly in terms of programs for mildly disabled students. This criticism of special education's minimal accountability in terms of meaningful student outcomes led to concomitant growth of mainstreamed and integrated opportunities for mildly disabled students (e.g., Heller, 1972; Reger, 1972), but little initial change for the severely disabled student population, 70% of whom were being served in segregated special education centers in 1978 (Kenowitz, Zweibel, & Edgar, 1978).

In the mid-1970s, concurrent with the passage of PL 94-142 (1975), educational arguments for the integration of severely disabled students began to appear in the literature and in presentations at national professional conferences (Brown et al., 1979; Brown, Nietupski, & Hamre-Nietupski, 1976; Brown et al., 1977; Martin, 1976). Central to this body of literature are both the principles of normalization (Wolfensberger, 1972) and the criterion of ultimate functioning (Brown et al., 1976). This latter criterion established the curricular imperative for integrated programs which focus on skills that will facilitate the individual's functioning "in complex, heterogeneous postschool environments" (Brown et al., 1977, p. 201). The criterion of ultimate functioning embodies the normalization principle, which prescribes that the quality and conditions of the disabled person's life should mirror as closely as possible the norms and cultural patterns of the larger society (Wolfensberger, 1972). Therefore, to attend the same school as one's nondisabled peers was argued to be both culturally normative and facilitative of future functioning in a diverse society.

The political-social climate reflected in public opinion and general social trends strengthened the integration position of educators and parents. Few who viewed Geraldo Rivera's 1972 national television expose of the conditions in a major New York institution can forget the images of neglect and abuse depicted there. These images had already reached a smaller audience of practitioners and parents with the publication of a series of photographic volumes by Burton Blatt (1966, 1970), but the national media attention stimulated by the 1972 and subsequent broadcasts opened many more eyes to the need for community services, for programs that would be visible in the community and therefore accountable both to the individuals and to their communities.

BARRIERS TO INTEGRATED OPPORTUNITIES

We have discussed the historical development of integration and the possible influences on the trend toward including severely disabled students in our schools and communities. However, the proposed comprehensive local school model of integration remains, in fact, but a model. Movement toward full integration has been sporadic and uneven in most areas of the nation; for example, in 1987 more than 21,000 severely disabled students in California were attending segregated special centers, approximately 55% of the total student population (reported in California as "severely handicapped"), despite the integration efforts of such metropolitan areas as San Francisco, Whittier, and Santa Monica (Farron-Davis & Halvorsen, 1987). Meyer and Putnam (1987) estimate that 10% to 55% of severely disabled students nationally are segregated, figures that are substantiated by the U.S. Department of Education's 1986 Eighth Report to Congress (*Newsletter*, April 1987) in which states report that up to 43% of their students classified as mentally retarded are served in segregated educational settings. In Massachusetts, for example, a recent study by Landau (1987) reported that between 1974 and 1985 a 243% increase occurred in the number of children served in segregated classrooms and separate schools, while at the same time, a 61% decrease occurred in the number of students placed in integrated settings. Landau indicates that if current placement trends continue, by the early 2000s the number of disabled (not just severely disabled) students placed in segregated settings will exceed the number served in integrated programs.

Given these trends and legal mandates, we must now examine why integration is not yet an option in many areas throughout the United States and why it appears to be decreasing in others. Why are families often required to take an adversarial stance with their districts to bring about integrated education for their sons and daughters? From its work with school districts throughout California and the nation over a 5-year period, the California Research Institute on the Integration of Students with Severe Disabilities (CRI) has developed an analysis of barriers to integration which is presented in its present (draft) form in Table 3.1. Each of these identified "barriers" is listed as a function of its systemic nature (cf., philosophical/attitudinal; systemic/administrative/fiscal; pedagogical/curricular; and legal/ethical). Attempted and suggested solutions to each identified barrier are listed and the source of the information is credited.

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The most interesting finding from an analysis of identified barriers to integration is the extent to which there are readily identifiable solutions to each problem, solutions effectively implementing integration in large urban as well as suburban and rural areas, including San Francisco; Madison, Wisconsin; Tacoma, Washington; Montgomery County, Maryland; Philadelphia; DeKalb County, Illinois; and numerous other locations, including statewide implementation in some cases such as Vermont and Hawaii (Meyer & Putnam, 1987). In light of these strategies which appear to have applicability across settings, what are the factors which have influenced the adoption of integrated practices in some areas, and the continuing segregation in others?

PREDICTORS OF INTEGRATED PLACEMENT

Much of the extant knowledge base regarding the placement of severely disabled students in regular schools is most properly in the realm of theory, although a number of factors have been identified that appear to facilitate or inhibit LRE placements. There are, to date, only a handful of studies that have attempted to delineate causative factors in LRE placement (cf. Brinker & Thorpe, 1984a, 1985; Filler, Goetz, & Sailor, 1986). Table 3.2 identifies 20 student, family, instructional, administrative, and logistical factors (and the supporting literature) that appear to be predictive of student placement. Student-related issues, such as perceived extent of disability, and family-related issues, such as extent of involvement and advocacy for integration, have been demonstrated to be significant predictors of placement in a large sample study conducted by Filler et al. (1986). This study utilized multiple regression techniques to investigate factors related to teacher estimates of daily contact between students with severe disabilities and their nondisabled peers. In the first set of analyses, 11 factors were used to predict opportunities for interaction for 104 students, 70 of whom attended classes located at regular age-appropriate schools (integrated) with the remainder attending special, disabled-only centers (segregated) in seven California school districts. The results indicated that students who attended integrated schools spent proportionally more time in contact with nondisabled peers than did their segregated counterparts, an important finding, since it contradicts the argument that center-based programs that engage in community vocational programming and the like lead to equivalent interactions with nondisabled peers.

Another finding of the study was that students with severe *multiple* disabilities were significantly more likely to attend an integrated school than were their peers with a single severe disability. However, once on

Text continues on p. 123

TABLE 3.1. **Analysis of "Barriers" to Integration**

BARRIER	SOLUTIONS
Philosophical/Attitudinal	
1. "Societal discrimination against minority group members" (Biklen, 1985, p. 112)	**1.** Increased preservice and in-service personnel training for administrators, regular and special educators in rationale for/outcomes of integration (Albright, Brown, Van Deventer, & Jorgenson, 1987; W. Stainback & Stainback, 1984a)
2. Traditional approaches have been protective, segregationist	**2.** Advocacy and provision of information by parent, professional, and legal groups (Meyer & Kishi, 1985; Piuma et al., 1983; Stetson, 1984)
3. Intolerance/negative attitudes toward difference/"deviance" (see Ashmore, 1975; Donaldson, 1980)	**3. (a)** LRE state and local policy development to encourage attitude change (Brinker & Thorpe, 1985; Halvorsen, 1986; McGregor et al., 1986) **(b)** Development of pilot model integrated sites for visitation by personnel and parents (Piuma et al., 1983)
Administrative/Systematic	
1. Governance structure encourages segregation (e.g., county model: Advisory Commission, 1986)	**1.** County/LEA agreements to share resources; incentives to LEAs to serve students in home districts (Advisory Commission, 1986)
2. Funding formulas reinforce restrictive placements (Advisory Comm., 1986) and centralized services	**2.** Financial incentives to serve in home LEA/integrated setting (AB 4074); fiscal data indicating integration less expensive (Campbell, personal communication, 1986; Copeland & Iverson, 1985; Piuma et al., 1985)
3. Space limitations in regular schools (Halvorsen, 1984)	**3, 4.** Conversion of special centers to regular schools, funding for additions to regular schools given integration plan (Greene Funds, California; Orelove & Hanley, 1979)
4. Existence of multiple special center facilities (Farron-Davis & Halvorsen, 1987)	
5. Inaccessibility of regular schools/architectural barriers	**5.** See 3 above. Also, not all students require barrier-free environment; survey schools and utilize site selection criteria (e.g., Halvorsen, 1986); modify as needed (Orelove & Hanley, 1979)
6. Difficulty of arranging services in sparsely populated areas	**6.** Cooperative arrangements between LEAs (Vogelsberg, Williams, & Friedl, 1980); heterogeneous groupings, regional specialists
7. Multifaceted nature of systems change process: redefinition of roles/responsibilities, coordination & communication breakdowns, problems in decentralizing related services	**7.** LRE systems change planning process to address all aspects, utilize support teams with all constituencies represented, specific objectives and timelines, interagency agreements (e.g., Halvorsen, 1986; Haring & Billingsley, 1984; McGregor et al., 1986; Meyer & Kishi, 1985; Piuma et al., 1983)

TABLE 3.1. *Continued*

BARRIER	SOLUTIONS
8. Parallel regular/special education administrative responsibility and structure	8. Merging of responsibility (W. Stainback & Stainback, 1984b); site-specific administration and supervision (Biklen & Taylor, 1985; Bogdan & Biklen, 1985; Knapczyk & Dever, 1979; Raske, 1979; Stetson, 1984)
Pedagogical/Curricular	
1. Categorical teacher licensing reinforces separate services	1. Movement to less and noncategorical models (e.g., Massachussetts) and/or to more heterogeneous models (Pumpian, pers. comm., 1985)
2. Specialized services needed for medically fragile students; students with severe behavior problems	2. Services can be designed and provided more efficiently (Piuma, 1985) and effectively in regular public school settings (e.g., LaVigna & Donnellan, 1987); transdisciplinary team model and integrated therapy (see Campbell, 1987; Frassinelli et al., 1983; McCormick & Goldman, 1979)
3. Educational and performance demands are easier for students to meet in special center settings	3. Segregated centers are commonly overadapted, prohibiting skill generalization to other environments (see Voeltz, 1984); natural contexts necessary for development of generalized skills and behaviors (see Brown, Nisbet, et al., 1983)
4. Shortage of trained personnel (Biklen, 1985)	4. Incentives to reduce turnover (Biklen, 1985), retraining of existing staff
Legal/Ethical	
1. Parents may not be aware of rights to LRE or due processes for advocating for children's rights	1. **(a)** Rights materials, assistance, and training through state education agency (SEA) DOE Personnel Development network (e.g., California Special Education Resource Network), advocacy groups (e.g., Protection & Advocacy), university projects (Halvorsen, 1983a; Meyer & Kishi, 1985) **(b)** Establishment of parent support and trainer-of-trainer networks (Halvorsen, 1983a); recruitment of surrogate parents (Biklen, 1985) to advocate **(c)** Recognition of parents as equal-status partners in educational process and decision making (see Vincent, Laten, Salisbury, Brown, & Baumgart, 1980)
2. Past mandates lacking provision of services to preschool students	2. Cooperative interagency programs to provide infant and preschool service models (e.g., LEAs and Divisions Developmental Services), implementation of new legislative mandates (e.g., PL 99-457, 1986)

TABLE 3.2. **Independent Variables**

FACTORS AFFECTING PLACEMENT	APPLICABLE RESEARCH	OTHER LITERATURE
Student Issues		
1. Age	Filler, Goetz, & Sailor, 1986	
2. Perceived extent of severity of disability	Filler et al., 1986	
3. Number and type of services needed (on IEP)	Filler et al., 1986; Piuma, 1985	
Family Issues		
4. Family socioeconomic status	Filler et al., 1986	
5. Perceived family involvement and advocacy for integration	Filler et al., 1986; Laski, 1985; Stetson, 1984	Halvorsen, 1983; Meyer & Kishi, 1985
Instructional Issues		
6. Teacher recency of training (date of graduation & no. of yrs. teaching this population)		
7. Amount of teacher in-service on integration	Brinker & Thorpe, 1984a, 1985	Murray & Beckstead, 1983
8. Teacher advocacy for integration	Filler et al., 1986; Stetson, 1984	
9. Individual Education Plan (IEP) process/document effect on placement		
10. State and/or local policy interpretation	Brinker & Thorpe, 1985; McGregor, Janssen, Larsen, & Tillery, 1986; Stetson, 1984	Halvorsen, 1986
11. Amount of administrator in-service		Piuma et al., 1983
12. Administrator advocacy for integration	Bogdan & Biklen, 1985; Stetson, 1984; Taylor, 1982	Piuma et al., 1983
13. Perception of regular school site administrator attitude	Pelligrini, 1986; Raske, 1979	Halvorsen, 1984; Meyer & Kishi, 1985
14. Perception of space/transportation availability	Kenowitz, Zweibel, & Edgar, 1978; Orelove & Hanley, 1979	Halvorsen, 1984
15. Perception of ancillary services		
16. Perception of cost feasibility	Piuma, 1985; Stetson, Elting, & Raimondi, 1982	
Logistical Issues		
17. Governance or educational responsibility		Advisory Commission, 1986
18. Type of community		
19. Perception of IHE involvement in integration	Haring & Billingsley, 1984	Freagon et al., 1983; Piuma et al., 1983
20. Perception of the status of existing special school facilities	Kenowitz et al., 1978	Finch & Landriau, 1987

campus, students with a single disability spent more time in contact with nondisabled peers. In a follow-up study of 149 students who attended integrated schools, the students' disability (single versus multiple) was again found to account for more variance (21.1%) associated with teacher estimates of contact than any other factor. Other significant predictors were the students' age, parental desire for contact, and language spoken in the home.

Brinker (1985) and Brinker and Thorpe (1985) conducted the first national investigation of integration for severely disabled students, with a sample of 245 students representing 13 school districts and 1 public institution in 9 states. The authors have noted the unique ecological scope of the project in its examination of predictive factors from multiple levels of the educational process, including information from states, districts, schools, and teachers as well as individual child data. Three types of information about state policy emerged as significant predictors of integration, when defined as the rate of social bids from severely disabled to nondisabled students ($S \rightarrow N$): (1) allocations of PL 94-142 (1975) funds specifically for the severely disabled population; (2) the number of categories in the state's definition of severely disabled students; and (3) the proportion of State Education Agency (SEA) fair hearings that were called regarding least restrictive environment issues. In the stepwise multiple regression analyses, these three factors accounted for 13.3% of the variance in integration ($F = 5.74$, $p < .005$). A fourth state level variable accounted for a significant proportion of the variance in integration when defined as nondisabled students' social bids *to* severely disabled students ($N \rightarrow S$): the percentage of full-time state level professionals working specifically with programs for severely disabled students, and providing technical assistance (3% of variance).

Brinker and Thorpe (1985) further examined these state policy variables in the context of antecedent variables related to local planning, school support, and parent involvement; and concurrent variables such as teacher attitude, instructional, and student issues. The four state policy factors continued to account for small but statistically significant proportions of the variance in $N \rightarrow S$ and $S \rightarrow N$ bids, or integration, combined with predictors such as the functional abilities of the severely disabled students, school and staff support for integration, educational planning for integration, characteristics of the physical and social environment, and behavior of participants in the interactive environment.

Thus, within the instructional and administrative categories of integration predictors, the following patterns emerged:

1. A generic definition of exceptionality by the state, including more heterogeneous groupings of students

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2. Funding patterns that reinforce specialized training programs for teachers of severely disabled students
3. Teacher certification requirements that lead to both special education training for regular educators and regular education training for special educators, and
4. A capability for provision of technical assistance by the SEA to local programs.

Stetson (1984) surveyed 122 district- and building-level personnel as well as parents from six sites representing a variety of community types and service-delivery models for severely disabled students. Her interviews yielded seven administrative factors critical to facilitating integration that reinforce those investigated by Brinker and Thorpe (1985). Stetson's seven factors include

1. Organizational support for the LRE concept
2. An appropriate service-delivery model
3. Assignment of personnel to provide administrative assistance and instructional leadership
4. A responsive staff development program that prepares personnel to assume new roles in integration implementation
5. Positive attitudes by regular education staff and students
6. Community acceptance of LRE
7. Parental acceptance of LRE for their severely disabled children.

These administrative factors are supported by a comprehensive descriptive study of 12 key integrated programs in 9 states undertaken by Taylor (1982). Structured phone interviews with administrators of model programs nominated by national leaders and experts in the field composed the first phase of the study, followed by site visits to 12 programs. Qualitative research methods including unobtrusive observations of integrated school and community settings, open-ended interviews with a variety of constituencies, and analysis of written policies, program descriptions, curricula, and schedules composed the triangulated data collection approach. Again, Taylor's data indicated the need for systematic local planning, and supported Stetson's (1984) and Brinker and Thorpe's (1985) later finding of the importance of program support or technical assistance and leadership to districts in the planning and implementation stages.

Additional administrative factors, such as the perception of cost feasibility, appear to have predictive value. Stetson, Elting, and Raimondi (1982) discussed the common administrative perception that offering segregated services is less costly than providing a range of integrated options, a perception stemming from the belief that fewer personnel and resources are required. However, in their work with over 50 public school systems, these authors found that administrators of integrated programs noted cost savings in transportation and administrative overhead. The authors thus hypothesize that while perceived cost increases appear to inhibit integration, information regarding decreases in costs will facilitate integrated placements. Further systematic investigation of this variable and its impact on placement is needed.

A related question is Which program type delivered more to the consumer per dollar spent: the segregated model or the integrated one? It has been assumed by many that the location of all services on a single site for severely disabled students would tend to hold costs down. A recent review of the literature and pilot study by Piuma (1985), however, cast doubt on even this assumption. Piuma compared costs of four classes of matched groups ($N = 28$) of severely disabled students operated by a county office of education (COE) in California, two on a special school (segregated) site and two on a regular school site. With all service factors held constant, the average cost per student for the segregated classes was $13,329, while for the integrated classes, the costs were $12,209, or a difference of 8.4%. The results, of course, are extremely limited in inference due to the small sample size and the case study approach. The data, however, receive some cross-validation from a second informal study conducted in a southern California county by Campbell (personal communication, 1986). Campbell compared severely disabled classes operated by a COE in segregated facilities with comparable costs of operating classes for similar severely disabled students by the local educational agencies on regular school grounds, and found the average cost per year for the student in the segregated program to be $18,500, whereas the average cost for students in the integrated programs was found to be $9,300, almost a 50% saving. Transportation costs were not factored into these computations, but other services to the students were informally calculated to be equal. Again, this study was conducted informally with only limited survey data in the absence of experimental controls, so inferences are limited.

The administrative perception of space availability has also been hypothesized to contribute to placement decisions for or against integration. Both declining enrollments and school closings as well as increasing enrollments and limited space are cited as reasons for maintaining or adding to segregated special centers in many areas, rather than providing for severely disabled students' education in the least restrictive environment. An early study by Kenowitz et al. (1978) examined future integration opportunities nationally for severely disabled students across 81 LEAs, and found that 20% of the administrators polled had plans to build additional segregated centers while 88% reported that their facilities had been built within the preceding five years. This may be explained by the growth of segregated centers, which peaked after the passage of PL 94-142 (1975), as discussed earlier.

Logistical factors such as the governance structure or educational responsibility for students are hypothesized to have a direct impact on placement. This hypothesis is supported by the *California Sunset Review of Special Education* (Advisory Commission on Special Education, 1986), which noted the tendency of the county office of education (or intermediate agency) model to promote segregated options for severely disabled students.

An additional potential predictor of integrated placement in the logistical category is university involvement in the integration process. A variety of districts throughout the United States have collaborated with institutions of higher education (IHE), special education departments, and projects such as CRI in systems change efforts for integration (e.g., San Francisco; Hawaii; Syracuse, New York; Albuquerque, New Mexico; Montgomery County, Maryland; Seattle, Washington; Madison, Wisconsin), while other systems have been directly affected through advocacy efforts and litigation in which IHE personnel participated (Laski, 1985). Further investigation of the contribution of this variable and the range of additional student, family, instructional, and administrative factors listed in Table 3.2 is needed to determine their generalizability as causative agents in placement decisions.

INTEGRATED BEST PRACTICES

There is a considerably larger research basis for the efficacy of integrated placements (cf. Brinker & Thorpe, 1984a; Falvey, 1980; Meyer, Eichinger, & Park-Lee, 1987; Pumpian, 1981; Sailor et al., 1989; Sailor et al., 1986; Voeltz, 1980, 1982), particularly in terms of various "best practices" that become possible when students with severe disabilities are educated alongside their nondisabled, same-age peers. Table 3.3 delineates those best practices, or "integration markers" (Meyer & Kishi, 1985), which have been investigated and described by numerous researchers working to facilitate maximal integration in regular school settings. The major sources of these quality indicators include Meyer, Eichinger, and Park-Lee (1987), California Research Institute literature reviews Years 1–5 (Sailor, 1987), the Brinker (1985) and Brinker and Thorpe studies (1984a, b; 1985; 1986), and a series of nearly two dozen investigations carried out by the California Research Institute on Integration (Sailor & Halvorsen, 1986). Papers by Brown, Helmstetter and Guess (1986) and by Sailor, Gee, Goetz, and Graham (1988) concluded that best practices may well be a function of the degree of severity of the disability of the particular student, with profoundly disabled students receiving much less of "best practices" instruction than severely disabled students.

We have identified nine major best practice variables that facilitate maximal integration and positive outcomes for severely disabled students across age groups, with two additional variables for students in the upper age group (12–22). A comprehensive list of indicators of these variables is contained in Table 3.4. We acknowledge a particular debt to Dr. Luanna Meyer from whose recent paper on program quality indicators (Meyer, 1985; Meyer, Eichinger, & Park-Lee, 1987) we borrowed heavily to compile this list. Specific studies related to each variable merit discussion.

Degree of Physical Integration

In the investigation by Filler and associates (1986) discussed earlier, involving more than 100 students across seven school districts, the amount of physical integration of students was found to be predictive of a second integration marker: opportunities for interaction between these students and their peers in regular education. A small sample study by Anderson and Goetz (1983) demonstrated that horizontal (peer-peer) interactions between severely disabled students and their nondisabled peers comprised 89% of the interactions in an integrated setting, while vertical (adult-child) interactions comprised 100% of these in a situation that was not physically integrated. Brinker (1985) also found that, despite inherent biological and behavioral limitations, students in integrated groups engaged in more than twice as much social behavior as did their peers in segregated groups and the proportion of positive interactions was significantly greater for integrated groups.

Extent of Contact with Same-age Nondisabled Peers.

This quality indicator has been highly associated with positive outcomes in numerous investigations. Brinker and Thorpe (1986) found that the best predictor of integration, defined again as social bids from severely disabled to nondisabled students, was the interactive environment, or the social output of the nondisabled students to their severely disabled (SD) peers. Specifically, in this investigation of 245 students, 60% of whom had no verbal communication, 83% of whom were dependent on others for some aspects of functional self-care activities, and 32% of whom had no

Text continues on p. 134

TABLE 3.3. **Best Practices Facilitating Maximal Integration**

PREDICTOR VARIABLES	SELECTED APPLICABLE RESEARCH	OTHER LITERATURE
Groups 1 and 2 (Students aged 3-11 and 12-22)		
1. Degree of physical integration	Anderson & Goetz, 1983; Brinker, 1985; Filler et al., 1986; Meyer, Eichinger, & Park-Lee, 1987; Murray, 1986	Brown et al., 1979, 1983; Brown, Nietupski, & Hamre-Nietupski, 1976; Piuma et al., 1983
2. Extent of contact with same-age nondisabled peers	Anderson & Goetz, 1983; Brady et al., 1980; Brinker & Thorpe, 1984, 1986; Filler et al., 1986; Haring et al., 1987; Johnson & Meyer, 1985; Kohl, Moses & Stettner-Eaton, 1983; McHale & Simeonsson, 1980; Meyer, Eichinger, et al., 1987; Murray, 1986; Rynders et al., 1980; Schleien, 1984; Voeltz, 1982	Hamre-Nietupski et al., 1978; Murray & Beckstead, 1983; W. Stainback & Stainback, 1982; Voeltz, 1980, 1984; Williams et al., 1982
3. Extent of normalized professional practices	Brinker & Thorpe, 1986; Cole, 1986; Halvorsen & Anderson, 1986; Knapczyk & Dever, 1979; Meyer, Eichinger, et al., 1987; Meyer, Fox, et al., 1987; Pellegrini, 1986; W. Stainback, Stainback, Courtnage, & Jaben, 1985; Stetson, 1984	Halvorsen, 1983b, 1984; Hamre-Nietupski & Nietupski, 1981; Meyer & Kishi, 1985; Murray & Beckstead, 1983; Sailor et al., 1986; Searl, Ferguson, & Biklen, 1985; S. Stainback & Stainback, 1985a
4. Extent of parent (or surrogate) involvement in program	Biklen, 1985; Blacher & Turnbull, 1983; Cone, Delawyer, & Wolfe, 1985; Meyer, Eichinger, et al., 1987; Snell & Beckman-Brindley, 1984; Voeltz, Wuerch, & Bockhaut, 1982	Allen, 1981; Blacher-Dixon, Leonard, & Turnbull, 1981; Doering & Hunt, 1983; Halvorsen, 1983a, 1984; Lipton, 1983; Meyer & Kishi, 1985; S. Stainback & Stainback, 1985a; Strully & Strully, 1985; Vincent et al., 1980
5. Extent and degree of personnel training	Brinker & Thorpe, 1985b; Doering, 1985; Fredericks, Anderson, & Baldwin, 1979; Ganschow et al., 1984; Meyer, Eichinger, et al., 1987; S. Stainback, Stainback, Strathe, & Dedrick, 1983; W. Stainback & Stainback, 1982; Wang et al., 1985	Anderson, 1986; Anderson & Doering, 1985; Bogdan & Biklen, 1985; Filler & Halvorsen, 1986; Filler, Halvorsen, & Rosenberg, 1984; Iacino & Bricker, 1978; W. Stainback & Stainback, 1984a
6. Extent to which instruction is data-based	Brinker & Thorpe, 1984b; Fredericks et al., 1979; Holvoet et al., 1983; Meyer, Eichinger, et al., 1987; Searl et al., 1985; Snell & Browder, 1986	Favell, 1977; Sailor & Guess, 1983; Sailor & Haring, 1977

TABLE 3.3. *Continued*

PREDICTOR VARIABLES	SELECTED APPLICABLE RESEARCH	OTHER LITERATURE
7. Extent to which instruction is geared to functional, generalized skills	Billingsley, 1984; Holvoet et al., 1980; Horner, Bellamy, & Colvin, 1984; Hunt et al., 1986; Kayser, Billingsley, & Neel, 1986; Liberty, 1985; McDonnell & Horner, 1985; Meyer, Eichinger, et al., 1987; Sailor, Goetz, et al., 1988; Searl et al., 1985	Brown et al., 1983; Horner, Sprague, & Wilcox, 1982; Hunt, 1985; Stokes & Baer, 1977
8. Extent to which educational program is transdisciplinary	Gee & Goetz, 1985, 1986; Gee, Harrell, & Rosenberg, 1987; Giangreco, 1986; Goetz & Gee, 1987; Hunt, Alwell, & Goetz, 1988	Campbell, 1987; Frassinelli et al., 1983; Iacino & Bricker, 1978; Lyon & Lyon, 1980; McCormick & Goldman, 1979; Nietupski et al., 1980; Orelove & Sobsey, 1987; Sailor & Guess, 1983; Sailor, Goetz, et al., 1988; Sternat et al., 1977
9. Extent of involvement in regular education program	Brinker & Thorpe, 1984b, 1985, 1986; Meyer, Eichinger, et al., 1987; Murray, 1986; Voeltz, 1984; Wang & Birch, 1984	Biklen, 1985; Grenot-Scheyer & Falvey, 1986; Halvorsen, 1983b, 1984, 1986; Knoll & Meyer, 1987; Meyer & Kishi, 1985; Piuma et al., 1983; S. Stainback & Stainback, 1985b; W. Stainback & Stainback, 1982, 1983, 1984a, 1984b; Stetson, 1984; Taylor, 1982; Voeltz, 1984; Will, 1986; Winston, 1985
Group 2 Supplemental Predictor Variables (Students aged 12-22)		
10. Extent of community-intensive instruction	Biklen & Foster, 1985; Gaylord-Ross, Forte, Storey, Gaylord-Ross, & Jameson, 1987; Gee et al., 1986; Sailor, Goetz, et al., 1988; Searl et al., 1985; Snell & Browder, 1986; White, Leber, & Phifer, 1985	Anderson, 1984; Bellamy & Wilcox, 1982; Bellamy, Wilcox, Rose, & McDonnell, 1986; Brown, Helmstetter, & Guess, 1986; Freagon et al., 1985; Hamre-Nietupski, Nietupski, Bates, & Maurer, 1982; Horner, Sprague, & Wilcox, 1982; Kregel, 1985; Nietupski, Hamre-Nietupski, Clancy, & Veerhusen, 1986; Sailor et al., 1986; Sailor & Guess, 1983
11. Extent of coordinated transitional planning	McDonnell, Wilcox, Boles, & Bellamy, 1985; McDonnell, Wilcox, & Boles, 1986; Schalock, 1986; Vogelsberg, Williams, & Friedl, 1980	Brown et al., 1981, 1984; Freagon et al., 1985; Graff & Sailor, 1986; McDonnell & Hardman, 1986; Wehman, Kregel, Barcus, & Schalock, 1986; Will, 1985

TABLE 3.4 Best Practice Indicators for Students Aged 3-22

1. Extent of Physical Integration

Special education classroom is centrally located in the age-appropriate comprehensive local school.or students are dispersed across regular classrooms throughout the school day

The ratio of disabled students attending the school represents the natural proportion of disabled to nondisabled students in the community

Special education classrooms are dispersed (if more than one)

Students travel to and from school using the general education transportation system*

Students use school enrichment areas (e.g., library) on a regularly scheduled basis*

All programs (regular and special) share the same school calendar and hours

Instructional arrangements, materials, and activities are age-appropriate

All special education and related personnel (including therapists) participate in generic professional and extracurricular school activities along with regular education staff*

The program philosophy emphasizes the goal of maximum participation in integrated community environments*

Each student participates in heterogeneously grouped instruction (including students with different levels of disability and nondisabled peers) at least 3 times weekly*

Instruction to teach new skills takes place in actual community environments*

Adapted playground equipment on the playground is also used by nondisabled peers*

The program philosophy emphasizes integrated therapy rather than a pull-out direct service model*

All school facilities, programs, and activities are accessible to students with disabilities

Students aged 12-22

Regular education students accompany the student off campus for portions of the community-based instruction

Community intensive instruction occurs in natural proportions with nondisabled persons in vocational, leisure, and domestic settings

Students pass in halls, use lockers between classes on the same schedule as their regular education peers

General school classrooms (such as shop, computer area, home economics rooms, etc.) are accessible and/or adapted for use by students with multiple disabilities*

2. Extent of Contact with Same-Age, Nondisabled Peers

Student participates in daily social and leisure activity interactions with same-age nondisabled peers (recess, sports, etc.)*

Program includes planned daily interactions with same-age nondisabled peers for at least a third of the school day

Student participates in extracurricular activities typical for his/her age range along with nondisabled students*

Students disperse and eat lunch in the cafeteria with same-age nondisabled peers

Each IEP includes at least one measurable behavior objective in each domain involving interactions with a peer or peers who are not disabled*

Nondisabled peers spontaneously interact with students when passing them in the hall or meeting them in central areas such as the lunchroom or playground*

Students aged 12-22

Natural proportions are observed in the use of general school facilities

Students attend dances, parties, games, rallies, and other integrated extracurricular events at least twice a month

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*Items marked with an asterisk are reprinted with permission from Meyer, Eichinger, & Park-Lee (1987), *Program Quality Indicators* (PQI)

TABLE 3.4 *Continued*

3. *Extent of Normalized Professional Practices*

School site administrator is responsible for both special and regular education program supervision and administration
The setting is normalized for students' chronological ages (e.g., decor/decorations, furniture, wall displays)*
Professional staff talk with (and about) students in a manner that communicates respect (i.e., do not yell at, make fun of, or talk about students as if they were not present)*
All equipment and individual prosthetic devices are kept in good working order*
Changes in activity and position are explained to students (rather than just pushing a wheelchair to another location, etc.)*
Student is physically positioned according to individual needs throughout the day and various instructional programs*
Alternative communication modes and adaptive equipment devices are used as needed for the student across all program areas*
The student has adaptive equipment*
Medical records are up-to-date, including information on medications and monitoring of any effects of medication for students*
Staff systematically fade out teacher intervention from nondisabled-disabled student interaction
Instructional strategies are individualized*
Team collaboration is involved in both planning and delivery of instruction*
The schedule reflects a variety of situations for the student, including independent work, small group, large group, one-to-one instruction, socialization, and free time*
Caregiving interactions and natural routines (eating, going to the bathroom, etc.) are utilized as opportunities for instruction*
Pupil-teacher staffing ratios are adequate and appropriate to meet the students' needs*
The student is given opportunities to make choices, provide input, and so forth (e.g., asking a student where he or she would like to sit)*
Behavior problems are viewed as instructional needs, indicating areas where skills for more appropriate behaviors must be acquired and practiced*
The program reflects a balance between safety concerns and normalized risk-taking based upon the student's age*
The student's transitions are facilitated by regular contact between "feeder" and "next" programs/schools (including community college and/or rehabilitation agency for secondary age)
An educative approach and "least intrusive means" (nonaversive) guidelines are followed to intervene with behavior problems*
Program philosophy emphasizes continuous updating of services by actively seeking information on new curricular developments*

Students aged 12-22

Each IEP includes personal management objectives reflecting a concern for teaching decision-making, choice-making, and autonomy*
The program philosophy emphasizes the development of both autonomy and individual responsibility by the student*

4. *Extent of Parent (or Surrogate) Involvement in Program*

Teachers communicate regularly with parents (e.g., log books back and forth, phone calls)
Student records are shared with the family while maintaining confidentiality*
Parent training is available and parents might be asked for assistance in working on skills with their child at home*

TABLE 3.4 *Continued*

Parents are invited to participate in staff development and site preparation (disability awareness) programs
There is active family involvement in assessing the students' needs, designing instructional priorities, and designing the IEP
Parents are encouraged to help identify individually effective instructional strategies (e.g., effective reinforcers)*
There is an "open door" policy regarding visits by parents and other relevant persons*
Parents receive a formal report on their child's progress on a quarterly basis*
General school parent groups (e.g., PTA) are open to and involve participation of parents of severely disabled students
The program philosophy emphasizes an individualized approach and responsiveness to families, with support to meet family needs
The state has joint state certification practices for special and regular educators (e.g., regular educators have special education course requirements and vice versa)
Supervised preservice fieldwork for teaching credentials occurs in model integrated school sites
Instructional staff have attended a regional or national professional conference within the past year*
The program maintains a collaborative research, development, and/or training relationship with a college or university*
The building principal or program supervisor observes personnel during instruction at least quarterly and provides staff with written feedback on performance at least annually*
Instructional staff maintain collegial interactions with at least one colleague in another school whose students have similar needs*
The program philosophy emphasizes the continuous updating of services by actively seeking collegial interactions with experts in the field*
At least once each year, the program utilizes an outside consultant with recognized expertise to provide technical assistance and/or training*
The program philosophy emphasizes sharing its own innovative and effective efforts with other services in the region*
The program philosophy supports the need for staff in-service training on a regular basis through provision of released time, etc.
The school principal has received training directly relevant to disability areas served in the school*
All processional personnel are certified by the state in the disability areas served*
Staff meet formally and consult with one another at least once a month regarding specific educational issues*
Teachers schedule time for training paraprofessionals with students on an ongoing basis and monitor paraprofessional program implementation in nonclassroom environments

6. *Extent to Which Instruction Is Data-Based*

Data on the student's performance are collected at least once weekly for each IEP objective, and those data are used to make program changes as needed*
The student spends most of his/her time engaged in active learning activities, with "down time" comprising on more than a few minutes at a time between activities*
Individualized task analyses and discrepancy analyses are done on the basis of individual instructional programs*
The IEP specifies present levels of performance referenced to environmental activities rather than IQ scores, mental age, or norm-referenced achievement test scores*
The IEP specifies measurable criteria for mastery of objectives*

TABLE 3.4 *Continued*

- Teaching staff alternate observing one another during instruction to both monitor programs and solve problems, when needed*

7. *Extent to Which Instruction Is Geared to Functional, Generalized Skills*

- Instructional programs specify procedures for fading teacher assistance, including instructional cues, corrections, and consequences*
- Instructional cues are designed to be closely related to natural cues available in criterion environments*
- Longitudinal planning occurs to prepare students for the demands of subsequent environments
- Ecological inventories are used to provide input into the design of individualized programs (i.e., assessing environmental domains)*
- The IEP specifies mastery as performance in criterion situations in actual environments without teacher assistance*
- Instructional trials are presented throughout the day, in addition to scheduled program sessions, whenever natural opportunities occur*
- The IEP specifies measurable criteria for mastery of objectives*
- Objectives in the IEP focus on functional skills and critical activities that are immediately useful in community settings (e.g., at home, in a store, etc.)*
- The IEP requires performance in the presence of nondisabled persons in actual situations in the community to indicate mastery of objectives*
- All IEPs state objectives to describe what the student will do, not what he or she will stop doing or what staff will do*
- New skills are taught in the context of naturally occurring activities and daily routines*

8. *Extent to Which Educational Program Is Transdisciplinary*

- The program philosophy emphasizes integrated therapy (across schedule and environments) rather than a pull-out direct service model
- Related services personnel (OT/PT/ST/VH) conduct functional assessments in natural environments and develop objectives with IEP/ITP team
- Therapy occurs across natural environments and is integrated into functional activities where skills will be utilized
- Therapists engage in consultative as well as direct services to ensure incorporation across the school day

Students aged 12-22

- Relevant community agency personnel (e.g., current/future residential care provider, case manager, Habilitation or Rehabilitation Services representative, vendor(s) of adult services) participate with parents and school personnel in Individualized Transition Plan (ITP) development beginning at age 15

9. *Extent of Involvement of the Regular Education Program*

- Special education staff attend general faculty meetings and regularly interact with all school staff*
- Special and regular education teachers share responsibilities (e.g., yard and lunch duty, chaperoning extracurricular events, etc.)
- Students participate in a range of regular education classes and activities on an ongoing individualized basis (e.g., music, art, home economics, physical education, etc.)
- Students' yearbook pictures are dispersed throughout as with regular education students
- Students participate in regular graduation ceremonies from high school
- Teachers take breaks/preparation periods with regular education faculty
- Teachers assist regular education staff with specific program planning for nondisabled students who experience behavior and learning difficulties

TABLE 3.4 *Continued*

Parents participate in regular school parent/family activities (e.g., PTA, "room parents," chaperoning, career days, etc.)

Supplemental Best Practice Indicators for Students Aged 12-22

10. Extent of Community Intensive Instruction

Each student receives instruction in the community (outside the school setting) at least once a week (ages 3-8), twice weekly (ages 9-11), or four times a week (ages 12-18), spending 80-100% of the day off campus by age 19-22

11. Extent of Coordinated Transitional Planing

The program philosophy reflects the expectation that the student will be a member of a sustained social network in his/her community
The program philosophy emphasizes the goals of competitive and/or supported employment in integrated, community work environments*
The program philosophy emphasizes preparation for living in the least restrictive adult environment*
Nonschool, community-based instruction is provided at least four times a week and increases with student age
The students have regular, consistent access to community training environments across vocational, domestic, leisure, and general community domains
The IEP for any student 12 and older includes vocational training objectives for specific job sampling
Each secondary age student participates in a competitive job or job training for part of the school day*
Each IEP includes objectives to develop social skills, including interaction with others in nonschool environments*
Objectives to develop leisure and vocational activity skills reflect attention to the student's personal preferences*
Parents, districts, and relevant agency personnel participate in a coordinated transition planning process for each student beginning several years prior to graduation

independent mobility skills, the authors found that the interactive behavior of nondisabled students accounted for five times the variance in the disabled student's social bids (40.9%) as did the second best integration predictor. The second best integration predictor, the average number of nondisabled students in the integrated environment, accounted for 8.4% of the variance. In a related study, Brinker and Thorpe (1984b) found that the rate of social interaction with nondisabled peers accounted for a statistically significant proportion of objectives met on the Individualized Education Program (IEPs) of SD students ($p < .025$), or 2.1% of the variance in the proportion of IEP objectives achieved.

A qualitative investigation by Murray (1986), which utilized participant observation strategies to examine the social relationships of high-school-age SD students and their nondisabled peers, suggests that high degrees of contact (on average, 33%–38% of instructional time) contributed to the development of reciprocal friendships between SD students and the peer tutors working with them. Haring, Breen, Pitts-Conway, Lee, and Gaylord-Ross (1987) also found that contact between nondisabled (ND) students and their SD peers through tutoring and friends programs resulted in significant increases in the amount and type of interaction during noninstructional periods, and that nondisabled high school students stated more positive reasons for their participation in these programs following contact.

Normalized Professional Practices

This variable has been cited by increasing numbers of researchers and practitioners in integrated settings, and has been further broken down by Meyer (1985) and Meyer and Kishi (1985), among others (see Table 3.4). Pellegrini (1986) found that "ownership" by elementary school site principals, measured by the extent to which they engaged in the same (normalized) supervisory practices with teachers of SD students as with regular education teachers at their site, was significantly related to the amount of integration reported by these principals. Specific research that separates normalized professional practices from other best practice variables is lacking; however, numerous reports from teachers (Halvorsen, 1983b, 1984) and data collected in a small group study on best practices utilized by teachers of Bay Area integrated classes (Halvorsen & Anderson, 1986) provide support for the importance of normalized practices such as talking about and with students in a manner that communicates respect (see also Meyer, 1987), and emphasize student similarities and strengths, thus modeling positive, age-appropriate, or normalized ways of interacting. Brinker and Thorpe (1986) demonstrate that several indicators of normalized professional practice are associated with rates of interaction. Four of their 19 ratings of resources and staff support, including support from the building principal and regular education teachers, accounted for 15% of the variance in the rate of social bids to regular education students from their SD peers. Individualized educational planning accounted for 7.2% of the variance, and three aspects of physical environment organization—age appropriateness of materials, clearly defined materials grouping, and separation of groups of materials—accounted for 5% of the variance in the rate of social bids. All of these variables characterize aspects of normalized professional practices.

Recent work by Cole (1986); Cole, Meyer, Vandercook, and McQuarter (1986); and Meyer, Fox, et al. (1987) suggests that another indicator of normalized professional practices is the systematic fading of teacher intervention in interactions between disabled and nondisabled peers. These studies, which compared the effects of high teacher-intrusive and low teacher-intrusive conditions, suggest that while high rates of intervention by teachers may be important in the initial stages of interaction, these levels should be diminished as students' familiarity with each other and the activity increases. Generally, more positive social interactions were observed in the low intrusive conditions as the interventions continued. An unnecessary adult presence may actually interfere with the development of the students' relationships. It can also be hypothesized that, by fading teacher intervention, a positive message is provided regarding the disabled student's competence, as opposed to the implication inherent when a teacher "hovers over" his or her pupils. It is not unreasonable to expect that this message, coupled with normalized practices that demonstrate respect for the student, may have an impact on the nondisabled students' attitudes as well.

Finally, these studies tend to lend support to the *contextual relevance* model suggested by Sailor, Goetz, et al. (1988), in which instructional tactics are recommended that are embedded in the context of the functional response to the environment required of the severely disabled student. These tactics differ from the more familiar (and more intrusive) tactics of verbal and physical prompting from instructional staff.

Extent of Parent Involvement

Biklen (1985), Halvorsen (1983a), and Meyer and Kishi (1985) discussed parent concerns that must be addressed prior to and during integration transitions, and suggested some strategies that promote parent/guardian participation in the integrated program. Further experimental research is needed to examine the impact of different levels and types of parent/family involvement in the integrated educational program; the majority of studies to date have focused solely on the function of parents as teachers of their disabled child (cf. Baker, Heifetz, & Murphy, 1980; Karnes & Teska, 1980). The current perspectives voiced by parents indicate the need for attention to a range of individual preferences on the nature and degree of their involvement (see Turnbull, Brotherson, & Summers, 1985). Position statements by Lipton (1983) and Strully and Strully (1985), which reflect their personal experiences with integration, emphasize the need for recognition of parents as equal-status partners in the integrated educational process. This recognition is critical to establishing the social validity of best practice outcomes, as Voeltz, Wuerch, and Bockhaut (1982) demonstrated in soliciting parental opinions of the outcomes of a leisure-training program.

A promising practice described by numerous authors (e.g., Doering & Hunt, 1983; California State Department of Education Individualized Criical Skills Model (ICSM), 1985; Vincent et al., 1980) is the use of parent interview strategies to obtain information about priorities for both the current and future environments and activities within which instruction will occur. Parents and/or care providers are asked about the family and student's weekday and weekend schedule and activities outside of school hours, and about their son's or daughter's performance in each of these settings. Information is obtained as to whether this activity (e.g., making breakfast) is a high priority for the family, and this information, combined with ecological/functional assessment data from other members of the team, is utilized to develop specific objectives in each curricular domain. Parents are also asked about their preferences for their child's future activities in vocational, leisure, domestic, and community domains. As a part of the overall process, the teacher also conducts inventories of neighborhood environments in order to assure that instruction will occur in these settings or ones that will closely match those utilized by the family.

As with the best practice exemplars discussed earlier, the involvement of families in the integrated educational process is closely tied to the comprehensive local school model of service delivery. Again, although specific research is not available, it appears that parents will be more likely to become involved in regular school activities (e.g., PTAs, advisory groups, chaperoning events, serving as "room parent" in elementary sites) if their child is attending his or her local neighborhood school. This type of involvement can facilitate the development of friendships with other parents and their children and, in turn, has been reported to facilitate the carryover of student relationships outside of school hours (Oshima, 1986).

Extent and Degree of Personnel Training

In two investigations, Stainback and Stainback (1982) and Stainback, Stainback, Strathe, and Dedrick (1983) have demonstrated the positive impact of inservice training on the attitudes of regular educators toward SD students. These teachers serve as models for their students, and collaboration of regular and special educators is critical to maximize integrated opportunities throughout the school day. As previously mentioned, Brinker and Thorpe (1985b), in their investigation of state policy predictors, found that joint teacher certification requirements for special and regular educators were predictive of integration. Bogdan and Biklen (1985) discuss the principal's role in mainstreaming and provide support for normalized professional practice and for principal self-education about special education, as well as for principal leadership in staff development programs on integration for the entire faculty.

Numerous authors have reported the need for revisions in preservice training programs for special education that should reflect the changing roles and new competencies required by teachers in integrated settings (cf. Anderson & Doering, 1985; Filler, Halvorsen, & Rosenberg, 1984). Some of the competencies are addressed by joint certification requirements, such as those in California, where teachers are required to obtain a regular education credential and therefore have had some experience with "real schools" when they begin their special education training program. In addition, preservice special education fieldwork experiences that utilize model integrated school sites as a part of the training process are key to preparing teachers for these roles, as has been demonstrated by follow-up data collected on graduates of two Bay Area universities (Anderson, 1986; Filler & Halvorsen, 1986). A separate evaluation study of the state-sponsored inservice training program in California (Doering, 1985) demonstrated that teachers who had received training in integrated, community-intensive programming for their severely disabled students were more effective in utilizing a variety of integrated nonclassroom and community environments for instruction than were the control group who had not yet participated in inservice, as demonstrated by higher quality IEPs, documented instruction and data collection on specified objectives.

Extent of Data-Based Instruction

For over a decade the literature has reflected the belief that data-based decisions made by teachers about student skill acquisition are less prone to error than are subjective judgments (cf., Favell, 1977; Sailor & Guess, 1983; Sailor & Haring, 1977). Holvoet, O'Neill, Chazdon, Carr, and Warner (1983) demonstrated that comparative judgments and decision-making about student performance were more accurate in the presence of systematic data collection. As reflected in Table 3.4, the components of this quality indicator signify more than simply the collection of periodic performance data. Student time engaged in learning activities with minimal "downtime" in transition periods, the existence of individualized task-analytic instructional programs based on discrepancy analysis procedures, and the presence of IEP objectives that exhibit meaningful performance statements, conditions, and measurable mastery criteria are essential best practices. Fredericks, Anderson, and Baldwin's (1979) investigation of competence needed by teachers of this population yielded two primary indicators: engaged instructional time and proportion of task-analyzed programs. In addition, as Brinker and Thorpe (1984b) have noted, although functioning level and rates of interaction with nondisabled students accounted for a statistically significant 15% of the variance in proportion of IEP objectives achieved; it is most likely that specialized educational techniques accounted for much of the remaining 85% of unexplained variance.

Extent of Functional, Generalized Skill Instruction

This quality indicator is at the core of best practices for the population of students with severe disabilities. The rationale for this is articulated succinctly by Brown et al. (1983) in a discussion of the learning and performance characteristics of persons with severe disabilities, and has been well documented elsewhere in the literature (e.g., Billingsley, 1984; Holvoet, Guess, Mulligan, & Brown, 1980; Horner, Sprague, & Wilcox, 1982; Liberty, 1985; Stokes & Baer, 1977). The reader is also referred to Sailor et al. (1986) and Sailor, Goetz, et al. (1988) for a detailed synthesis of the literature in terms of both functional, generalized skills and instruction within the community-intensive model; and to Snell and Browder (1986) for an overall evaluation of research focusing on community-intensive instructional practices, in terms of both effectiveness and social validity.

It is instructive to note that when Billingsley (1984) conducted his evaluation of nearly 500 objectives on IEPs for a sample of 22 students in two school districts, all of whom were attending segregated school programs, he found that the number of objectives in which a generalized outcome was specified was negligible, at most 7%. Further analysis to determine whether objective clusters that indicated or implied the need for a generalized outcome existed, turned up only one objective cluster (two objectives) for one student. We can speculate about the reasons for this, but the fact remains that, as Billingsley emphasizes, generalization is not a "frill"; regardless of how many potentially functional skills are taught in simulated settings, the value of these skills is minimal unless students have been trained to use them and can apply them within natural environments that are utilized on a regular basis (p. 191).

An experimental investigation by Hunt, Goetz, and Anderson (1986) compared the IEPs written by teachers on integrated school sites with those from segregated teachers of severely disabled students with control for type and recency of teacher training. Three categories of quality indicators were utilized to evaluate objectives on IEPs, one of which was generalizability. IEPs of integrated teachers contained more objectives that specified instruction across settings and materials, as well as more objectives to be taught in the natural setting; the data analysis demonstrated significantly higher quality overall for the IEPs of integrated students. While this study properly belongs in the examination of integrated outcomes, it is useful here in a discussion of best practices because of its implication that integrated settings are inherently more conducive to generalized instruction.

Extent to Which Program is Transdisciplinary

Several recent investigations support the importance of a *transdisciplinary model,* which results in the provision of integrated therapy across natural environments. For example, Gee and Goetz (1985) and Goetz and Gee (1987) taught effective use of residual vision in conjunction with fine motor skills within the ongoing activity routines of play, household chores, and self-care tasks, where completion of the task within the activity routine was made contingent upon the use of vision. Instruction occurred only at the natural points in the activity where visual skills were necessary to activity continuation. Gee and Goetz (1986) taught basic orientation and mobility skills to four profoundly disabled students within the context of travel routes that the students needed to learn, in order to gain access to specific activities and environments. In spite of the fact that these students lacked traditional prerequisites (concept discrimination items of the Peabody Mobility Scale) for this type of instruction, they all succeeded in generalizing their motor skills to new, unfamiliar routes, and also demonstrated a high level of incidental learning of landmarks or other natural cues and memory tasks specific to each route. The authors speculate that generalized learning in each of these situations was enhanced by the provision of instruction within the context of actual routes, or the integration of vision and orientation/mobility services throughout natural contexts. This research and additional work in the area of communicative conversational skills (Hunt, Alwell, & Goetz, 1988) provide support for both the teaching of functional, generalized skills, and for the transdisciplinary model of assessment and instruction of basic communicative, motor, visual, and mobility skills within the context of naturally occurring critical activities (Lyon and Lyon, 1980; Nietupski, Schutz, and Ockwood, 1980; Sailor, Goetz, et al., 1988; Sailor & Guess, 1983).

Extent of Involvement in the Regular Education Program

This is clearly a critical integration marker, particularly for elementary-age students. The positive outcomes associated with close cooperation and sharing of special and regular education responsibilities have been documented by numerous authors, including many of the researchers cited previously (e.g., Biklen, 1985; Brinker & Thorpe, 1984a, b, 1985, 1986, Meyer, Eichinger, & Park-Lee, 1987; Murray, 1986; Pellegrini, 1986; W. Stainback & Stainback, 1982, 1983, 1984a, b). Taylor (1982) found that staff must be integrated in order for severely disabled students to experience effective interaction.

In her qualitative ethnographic study at a Bay Area high school, Murray (1986) found that one of the constraints to maximal integration was the existence of a separate department and chairperson of special education, in contrast to regular education departments organized by subject/content areas. Knoll and Meyer (1987), Sailor, Goetz, et al. (1988), Stainback and Stainback (1984b), Voeltz (1984), and Will (1986), among others, have advocated for a merger of special and regular education administrative structures as necessary to facilitate quality integration, where students with severe disabilities will be regarded as having equal status with their nondisabled peers. Voeltz (1984) and Stainback, Stainback, Courtnage, and Jaben (1985) have described modifications that can be made in regular education curricula and classroom arrangements in order to assure the ongoing awareness and acceptance of disabled students as a part of the overall school community. Teachers and administrators from effectively integrated programs (cf. Halvorsen, 1983b, 1984; Meyer and Kishi, 1985) have reported the importance of consistent and regular interaction with regular education faculty, including participation in faculty meetings, committees, social events, extracurricular clubs, and student organizations. Biklen (1985), Piuma et al. (1983), Stetson (1984), Taylor (1982), and numerous others who have worked with integrated programs support the notion of integrated regular and special education services through the designation of single administrative responsibility (e.g., site principal) for all services and programs in a given school. As Biklen (1985) states, "When we no longer need the term *special*, we will have achieved equality" (p. 176). Thus, the extent of our involvement in the regular education program, and the diminishing of the lines between these two parallel structures, is expected to result in the full instantiation of integration as a part of everyday life.

Extent of Community Intensive Instruction

Two additional markers for students twelve years of age and older must be considered in a review of best practices for quality integrated education. The first of these is the extent of community intensive instruction, which increases in importance as students progress in age. As Sailor, Goetz, Anderson, Hunt, and Gee (1988) note, evidence that directly compares the outcomes of integrated, community-intensive instruction with outcomes of segregated, classroom intervention is minimal. The need for efficacy research, particularly with the most severely, multiply disabled (or "profoundly disabled") students has been discussed by Brown, Helmstetter, and Guess (1986), who note that much of the outcome data that does exist has focused on the less disabled students within the severely handicapped range. One initial validation study that utilized a multiple baseline design to examine the efficacy of this model for young profoundly multiply disabled students was conducted by Gee, Goetz, Graham, and Lee (1986). Four students classified as deaf-blind with accompanying profound retardation and motor disabilities, participated in multiple nonclassroom and community contexts for the instruction of basic motor and sensory skills. Contextual functional assessment procedures were followed by instruction of targeted skills such as orienting to sound, increasing range of motion in a specific limb, grasping, and visual fixation within leisure, vocational, and community purchasing activities. Successful acquisition of skills was demonstrated. The theory of contextual relevance and related research that supports community intensive instruction on this basis have been discussed elsewhere (Sailor, Goetz, et al., 1988) as have the design and implementation of the model (Anderson, 1984; Sailor et al., 1986; Sailor, Goetz, et al., 1988). Here we shall note only that nonclassroom instruction in other school environments is seen as critical to the integration of young (3–6-year-old) students, comprising approximately 25% of instructional time, with nonschool or community intensive instruction increasing from 10% at this age to 90–100% for students aged 19–22.

Extent of Coordinated, Transitional Planning

The need for continual expansion of instruction in relevant community environments for students approaching graduation age underlies this final best practice indicator of integration. This type of planning is necessary to ensure postschool integrated living and meaningful work placements. A national survey conducted by McDonnell, Wilcox, and Boles (1986) concluded that individualized interagency planning must occur to increase students' access to community services. Evidence exists that specific transition-planning strategies combined with an integrated program that reflects all of the best practices variables discussed above will result in increases in nonsheltered, integrated placements of program graduates (Graff, 1987; Brown et al., 1985, 1987). In San Francisco, for example, although an integrated community-intensive model had been implemented generally for high-school-age severely disabled students since 1983, it was not until comprehensive individualized transition planning and supported employment programming were initiated for 1987 graduates that the majority of these graduates obtained integrated, nonsheltered, meaningful, postschool work placements (Gaylord-Ross et al., 1987; Graff, 1987).

OUTCOMES OF INTEGRATED PROGRAMMING

As we noted at the beginning of this chapter, until this decade, the principal question for programmatic research was, should students with severe disabilities be moved to less restrictive educational placements? The answer is a clear yes: Virtually all available research reviews indicate better educational outcomes associated with integrated placements as compared to their segregated counterparts (Sailor, Goetz, et al., 1988). Both the California Research Institute (CRI) and the Minnesota Consortium on the Education of Students with Severe Disabilities (USDOE/SEP Contract No. 300-82-0363) have delineated multiple positive outcomes of integration for SD students, which in the interest of space limitations are listed with the supporting research in Table 3.5.

Degree of Integration in the Next Educational Environment

This integration outcome refers to the increased likelihood that, for example, severely disabled preschoolers who are currently integrated will be more likely to experience future elementary and secondary education in settings with their nondisabled peers, and that students graduating from integrated programs will have greater access to nonsheltered postschool environments, as discussed above (cf. Brown et al., 1985, 1987). The ongoing growth of integrated school placements in areas such as Hawaii (Voeltz, 1984) and the San Francisco Bay Area (Sailor and Halvorsen, 1986) further substantiates this outcome.

Social Development

This outcome of integrated best practices has been described by multiple investigators, including Gaylord-Ross and Pitts-Conway (1984) in a high school program for students with autism; Schactili (1987), who found decreased rates of inappropriate behavior and increased social initiations in elementary-age students as a function of peer interaction in a game setting; and Falvey (1980), who demonstrated changes in the social competence of kindergarten-age integrated students. Anecdotal reports of improved appearance (e.g., Kahan, 1984) of integrated students are fre-

Text continues on p. 146

Table 3.5. Outcomes of Integration for Students Aged 3-22

DEPENDENT VARIABLE	APPLICABLE RESEARCH	OTHER LITERATURE
1. Degree of integration in next educational environment	Brown et al., 1985, 1987; Crapps, Langone, & Swain, 1985; Hasazi et al., 1985	Graff, 1987; Sailor & Halvorsen, 1986; Voeltz, 1984
2. Social development (including appearance); less excess behavior	Brinker, 1985; Borthwick, Meyers, & Eymann, 1981; Chin-Perez et al., 1986; Donnellan, LaVigna, Zambito, & Thvedt, 1985; Falvey, 1980; Gaylord-Ross & Pitts-Conway, 1984; Hanline, 1985; Hunt et al., 1988; Jenkins, Speltz, & Odom, 1985; Schactili, 1987; Selby, 1984	Giannini (pers. comm.), 1987; Kahan, 1984; Meyer & Evans, 1986
3. Affective development	Park & Goetz, 1985	
4. Interactive social development	Anderson, 1984; Anderson & Goetz, 1983; Baldwin, 1979; Brady et al., 1984; Breen et al., 1985; Brinker & Thorpe, 1984a, 1985a; Cole, 1986; Cole et al., 1986; Goldstein & Wickstrom, 1986; Guralnick, 1976; Haring et al., 1987; Hendrickson et al., 1982; Hunt et al., 1988; James & Egel, 1986; Kohler & Fowler, 1985; Lord & Hopkins, 1986; Meyer, Fox, et al., 1987; Meyers-Winton, 1980; Murata, 1984; Odom et al., 1985; Odom & Strain, 1984; Powell et al., 1983; Smith, 1984; Strain et al., 1977; Strain & Odom, 1986; Voeltz, 1982; Voeltz & Brennan, 1982	Brown et al., 1983; Guralnick, 1976, 1984; Hamre-Nietupski, Nietupski, Stainback, & Stainback, 1984; Johnson & Johnson, 1983, 1986; Sailor et al., 1986
5. Skill generalization in multiple environments	Gee & Goetz, 1985, 1986; Goetz & Gee, 1987; Goldstein & Wickstrom, 1986; Keyser et al., 1986; Lord & Hopkins, 1986; Murata, 1984; Sailor, Goetz, et al., 1988; Selby, 1984, White et al., 1985	
6. Parent expectations for child's future	Anderson & Farron-Davis, 1987; Freagon et al., 1983; Hanline & Halvorsen, 1989; Disability Rights, 1985	Giannini (pers. comm.), 1987; Lipton, 1983; Strully & Strully, 1985; Turnbull & Turnbull, 1985; Vesey, 1985

Table 3.5. *Continued*

DEPENDENT VARIABLE	APPLICABLE RESEARCH	OTHER LITERATURE
7. Health and increased independence	Anderson & Farron-Davis, 1987; Turnbull & Turnbull, 1985	Forest, 1984, 1986; Vesey, 1986
8. Proportion of IEP objectives obtained	Almond, Rodgers, & Krug, 1979; Brinker & Thorpe, 1984a; Wang & Baker, 1986	Hunt, Goetz, & Anderson, 1986
9. Attitudes of nondisabled students at school	Bricker & Bricker, 1977; Brinker & Thorpe, 1984a; Donaldson, 1980; Fenrick & Petersen, 1984; Haring et al., 1987; McHale & Simeonsson, 1980; Odom et al., 1984; Peck et al., 1978; Ray, 1985; Sasso, Simpson, & Novak, 1985; Siperstein & Bak, 1985; Voeltz, 1980, 1982	Johnson & Meyer, 1985; Murray, 1986; Murray & Beckstead, 1983
10. Postschool or school-related integrated work placement	Brown et al., 1985, 1987; Crapps et al., 1985; Gaylord-Ross et al., 1987; Gersten, Crowell, & Bellamy, 1986; Pumpian et al., 1980; Pumpian, Shephard, & West, 1986; Schalock, 1982; Wehman et al., 1982; Wehman, Hill, et al., 1985; Wehman, Kregel, & Seyfarth, 1985	Bellamy et al., 1986; Graff, 1987
11. Postschool or school-related job earnings	Gaylord-Ross et al., 1987; Hasazi et al., 1985; Hill & Wehman, 1983; Wehman et al., 1982	
12. Attitudes of persons in the community	Bates, Morrow, Pancsofar, & Sedlak, 1984; Hurd, Costello, Pajor, & Freagon, 1981; Pumpian, 1981; Pumpian et al., 1986	Halvorsen, 1983a; Nietupski et al., 1980
13. Normal living circumstances	Close, 1977; Conroy et al., 1982; Gage et al., 1987; Hasazi et al., 1985; Hill, Lakin, & Bruininks, 1984; Lakin & Bruininks, 1985; Sokol-Kessler, Conroy, Feinstein, Lemanowicz, & McGurrun, 1983; Walbridge & Conroy, 1981; Walbridge, Whaley, & Conroy, 1981; Wyngaarden, Freedman, & Gollay, 1976	Singer, Close, Irvin, Gersten, & Sailor, 1984

quently provided by teachers and parents of previously segregated students as well (Giannini, personal communication, January 1987).

Affective Development

Closely tied to social development outcomes is evidence that integrated settings result in significantly more positive affect for persons with severe disabilities than do segregated settings (Park & Goetz, 1985). These investigators compared the affect of young adults with severe, multiple disabilities who were attending a program based at a community college (integrated) with a matched group of adults attending a sheltered day activity center (segregated), utilizing a scale adapted from one previously validated by Dunlap and Koegel (1980). Analysis using nonparametric statistics indicated significant differences between the groups in the direction of more positive affect for the community college group across two settings.

Interactive Development and Skill Generalization

Empirical support for increases in severely disabled students' interactive behavior as a function of structured intervention in integrated settings is perhaps the most prevalent finding reported in the integration literature (e.g., Anderson, 1984; Anderson & Goetz, 1983; Baldwin, 1979; Brady et al., 1984; Breen, Haring, Pitts-Conway, & Gaylord-Ross, 1985; Brinker & Thorpe, 1984a, 1985; Cole, 1986; Cole et al., 1986; Haring et al., 1987; Kohler & Fowler, 1985; Meyer, Fox, et al., 1987; Meyers-Winton, 1980; Murata, 1984; Smith, 1984; Strain & Odom, 1986; Voeltz, 1982; Voeltz & Brennan, 1982; etc.).

The hypothesis of enhanced motivation accruing to situations involving reciprocal horizontal (child to child) interactions is an outgrowth of some anecdotal observations of dramatic changes that have seemed to occur when formerly segregated students with severe disabilities were brought into a social context of involvement with same-age, nondisabled peers. Much of the early enthusiasm shown by special educators in response to the push for integration from Lou Brown (Brown et al., 1983) and others stemmed from these observations. There seemed to be something "magic" about regular and sustained contact with nondisabled age mates that produced increased responsiveness and indications of positive affect, even in students who had been very largely unresponsive in the absence of these contacts. The focus of research under this hypothesis has thus been to discover elements of the child-child interactive process that might explain increased responsiveness, and to validate the assumption that this increase would be reflected in more efficient instruction in new skill acquisition and generalization.

Much of the available research on horizontal interaction has been discussed elsewhere (Sailor, Halvorsen, Anderson, Goetz, Gee, Doering, & Hunt, 1986; Sailor, Anderson, Halvorsen, Filler, & Goetz, 1989); however, a number of studies merit comment. As we discussed briefly before, Anderson and Goetz (1983) conducted a comparative study of the nature of social interaction available in segregated versus integrated sites. Interactions were measured using the Educational Assessment of Social Interaction (EASI) checklist developed in conjunction with California Research Institute (Goetz, Haring, & Anderson, 1983). The results indicated that there were significantly more opportunities for interaction between severely disabled children and nondisabled children in the integrated setting. More important, these researchers found that 100% of the interactions sampled in the segregated settings were vertical (from a nondisabled adult caregiver to a severely disabled child). In the integrated settings 89% of the total interactions were horizontal (child to child), and only 11% were vertical caregiver interactions. These data indicate that not only are there more opportunities for interaction in integrated environments, but that students take advantage of these opportunities, as demonstrated by the fact that the overwhelming majority occur between ND and SD peers.

In addition, research is beginning to show that these reciprocal horizontal (peer-peer) interactions available in integrated settings enhance *skill acquisition and generalization* (Sailor et al., 1989). For example, studies have shown that communication skills (Goldstein & Wickstrom, 1986; Hunt, Alwell, & Goetz, 1988), play skills (Murata, 1984; Selby, 1984), and social skills (Lord & Hopkins, 1986) can be generalized and maintained when taught within the framework of horizontal relationships.

Goldstein and Wickstrom (1986) taught nondisabled children specific strategies to promote communicative interactions on the part of their preschool disabled classmates. The intervention resulted in increased rates of communicative interactions as well as generalizations, particularly in the incidence of "on-topic" responding to initiations from the nondisabled children. The authors expressed the conclusion that "peers who act as intervention agents in one setting or activity will also share in many other activities with the handicapped child, and can thus serve as common stimuli for interactive behavior in untrained settings" (p. 214).

Murata (1984) conducted a study to evaluate a role-playing procedure for training nondisabled peers to play age-appropriate games with severely disabled students. Her dependent variable was changes in the severely disabled students' social interaction behaviors. Her multiple baseline design revealed significant positive changes across three students as an outcome of the peer-training procedure.

Lord and Hopkins (1986) reported a study in which they examined the social behavior of children with autism in interactive dyads with both same-age (10–12 years) and younger (5–6 years) nondisabled peers. In this study, the nondisabled children were not specifically trained in ways to interact with the autistic children, yet when opportunities to interact spontaneously in dyads were presented, the autistic children not only spontaneously interacted, as measured by several indices, but generalized interactive skills to still other nondisabled peers, an effect also found by Smith (1984) in a similar study. The effects were stronger with the same-age peer dyads.

Other studies that have demonstrated positive peer-mediated social interaction effects in severely disabled children include those of Guralnick (1976); Hendrickson, Strain, Tremblay, and Shores (1982); Odom, Hoysun, Jamieson, and Strain (1985); Odom and Strain (1984); Strain (1977); and Strain, Shores, and Timm (1977). Many earlier studies were reviewed by Strain, Kerr, and Raglund (1981).

Finally, several recent studies have examined benefits to disabled children from structured efforts to improve interactions with their nondisabled siblings. Powell, Salzberg, Rule, Levy, and Itzkowitz (1983) trained parents to engage in particular strategies to promote more functional and effective interactions between their disabled children and those children's nondisabled siblings. Sustained, generalized improvements in interactions were associated with parents' acquisition of the trained skills.

James and Egel (1986) evaluated a direct prompt–training strategy to increase reciprocal interactions between and, by generalization, among siblings. Using a multiple baseline design across three pairs of siblings, the authors' training procedures, which consisted of direct prompting and modeling techniques, resulted in increased reciprocal interactions, including increased levels of imitations by the disabled preschool-age children, and generalization of improved interaction skills to other play groups. The changes in interactive behavior were further shown to maintain themselves at least six months after intervention.

Brinker's (1985) large sample studies on integration provided still further support for the importance of horizontal interactions. The degree of integration measured in this study was the rate per minute of social bids that severely disabled students directed toward nondisabled students in the environment. In this sample, 245 students with severe disabilities of all school ages were observed over eight 10-minute observation periods scheduled throughout the school year. The most significant proportion of the total variance in this multiple regression study that predicted the degree of integration was the amount of social behavior directed toward the students with severe disabilities. The authors concluded that nondisabled, same-age peers are the key to successful integration efforts.

What can be attributed to the outcomes of the research to date on the nature and efficacy of horizontal social interactions? There is a growing body of evidence that students with severe disabilities are indeed motivated to interact with their nondisabled age mates and that these interactions are facilitative of acquisition and generalization of a range of contextually relevant skills. The evidence also suggests that horizontal relationships can and should be directly facilitated by teaching staff, if not specifically trained.

Much research remains to be done to shed light on the elements of horizontal relationships that most directly benefit instructional goals and objects. Further research is clearly needed on the differential nature of various styles of horizontal interactions, such as peer tutorials, compared to spontaneous, nontutorial friendship relationships (cf. Haring et al., 1987; Murata, 1984; Selby, 1984; Smith, 1984; and Voeltz, 1980; 1982).

The point of this hypothesis is that a part of context relevance (in this case the relevance of the *social* context) that enhances instruction in natural community environments accrues to the presence of reciprocal interactive relationships among students with severe disabilities and their nondisabled age mates. The question for the future is how to apply this knowledge to increase the motivation of these students to acquire socially beneficial skills.

Improved Parental Expectations for Their Child's Future

Anderson and Farron-Davis (1987), and Freagon et al. (1983) have documented these outcomes, which have been reported by numerous parents (e.g., Vesey, 1986) as well. Parental reports have also included statements attributing the *increased health and independence* of their sons and daughters (Turnbull & Turnbull, 1985; Vesey, 1986) to the integrated environment, and this outcome has also been anecdotally reported in the literature (Forest, 1984; 1986).

The longitudinal study conducted by Anderson and Farron-Davis (1987) utilized a structured parent interview format within integrated and segregated groups to obtain information about (a) in what types of environments across the categories of home, respite, eating, personal fitness/health, religious, vacation, cultural, sports, recreation, occupation, education and transportation did the family participate, and in what proportion (with what frequency) did the disabled child participate with the family; (b) what level of assistance was required by the student in these environments; and (c) the parents' expectations for the student's future level of independence in the settings. Two groups of parents of five integrated and five segregated matched students participated in the study over a four-year period, and results indicated an appreciably higher level of assistance across the range of activities was perceived as needed by the parents of students in the segregated group. This perceived level of assistance increased over time, but was not statistically significant. Similarly, the perceived level of assistance needed by integrated students decreased over the four-year period. Initial data from a descriptive parent interview study by Hanline and Halvorsen (1989) indicated that movement of the child to an integrated setting significantly increased family expectations for their son's or daughter's future functioning.

A recent study by the Disability Rights Education and Defense Fund (DREDF, 1985) examined educational equity and disabled high-school-age students, in order to ascertain factors that influenced the future plans of disabled students, their families and teachers, in two northern California school districts. Results from questionnaires/interviews with 130 parents demonstrated strong correlations between parental expectations for post-school living and working opportunities, and the extent to which their children were integrated, both at school and in social situations outside of school. For example, only 17% of the parents of disabled high school students attending fully segregated school settings expected their children to live independently, as opposed to 95% of parents of integrated students. Similarly, only 20% of parents of the fully segregated group expected full employment for their children, while approximately 90% of parents of integrated students expected full employment. Approximately 27% of the total sample were parents of students with severe disabilities; however, analyses indicated that for all skill levels, school segregation had a strong, negative relationship to parent expectations.

Increases in the Proportion of IEP Objectives Obtained

This outcome has been demonstrated in studies by Brinker and Thorpe (1984b), which we discussed earlier, and by Wang and Baker (1986). Wang and Baker utilized meta-analysis techniques to select and examine eleven empirical studies from a total pool of 264 studies of mainstreaming effects over a ten-year period. Results showed that mainstreamed special education students consistently outperformed their segregated peers from comparable disability classification groups. In addition, as was discussed in the previous best practices section, the quality of IEPs of integrated students has been demonstrated to be significantly better overall than that of segregated students' IEPs (Hunt et al., 1986).

Improved Attitudes Toward Severely Disabled Peers

McHale and Simeonsson (1980) and Voeltz (1980, 1982) were among the first to demonstrate the impact of interaction on peer attitudes, illustrating that when students receive accurate information about each other and are provided with opportunities to use that information on an ongoing basis, social acceptance occurs (cf. Donaldson, 1980; Johnson & Meyer, 1985; Siperstein & Bak, 1985). Voeltz (1982), Murray and Beckstead (1983), and Murray (1986) argued further that these longitudinal interactions lead to children having increased tolerance for diversity and difference in general. Additional research has demonstrated that nondisabled students continue to experience expected developmental gains when integrated with their severely disabled peers (Bricker & Bricker, 1977; Odom, DeKlyen, & Jenkins, 1984; Peck, Apolloni, Cooke, & Raver, 1978).

Community Employer Attitudes and Future Work Earnings and Placement

Pumpian, Shephard, and West (1986) have demonstrated the benefit associated with integrated, community-intensive vocational instruction for students with severe disabilities in terms of community and employer attitudes (see also Bates, Morrow, Pancsofar, & Sedlak, 1984; Hurd, Costello, Pajor, & Freagon, 1981; Pumpian, 1981), and in terms of future integrated work placements. Research conducted by, for example, Gaylord-Ross et al. (1987) has demonstrated that best practices within this model result in student advancement to more traditional work experience programs during school years, where they are employed at minimum wage and are supervised increasingly by employers. Graff's data on graduates from San Francisco integrated programs (1987) and data from Madison, Wisconsin (Brown et al., 1985, 1987), coupled with studies by Wehman et al. (1982); Wehman, Hill, et al. (1985), and Wehman, Kregel, and Seyfarth (1985) provide further evidence of positive postschool employment outcomes in terms of placement and wages.

Normalized Living Arrangement

A final outcome related to the quality of life for students with severe disabilities is a full range of individualized living options, particularly for individuals approaching adulthood. It can be hypothesized that this outcome is related not only to best practices, but also to other predicted integration outcomes, such as heightened community awareness, increased parental expectations, and the improved health, independence, and social skills of severely disabled persons. Walbridge and Conroy (1981) found that neighbors of a community group home experienced a positive shift in attitudes over time, further support for the thesis that contact and interaction result in acceptance of severely disabled persons. Additional study of the characteristics of neighbors with positive attitudes toward community living arrangements indicated that approximately 20% of the variance in this variable was accounted for by individuals' knowledge of mental retardation. Singer, Close, Irvin, Gersten, and Sailor (1984) have demonstrated that individuals can live successfully in the community regardless of their skill level, behavior problems, or the geographic nature of their receiving region. These authors evaluated a rural deinstitutionalization project for young, very severely disabled adults who also exhibited severe aberrant behaviors and were considered a "threat to the community" at the outset of the project. This study extended earlier findings by Close (1977); Conroy, Efthimiou, and Lemanowicz (1982); and Gage, Fredericks, Baldwin, Moore, and Grove (1987) in demonstrating that institutional residents not considered good candidates for community placement can nevertheless adapt to and thrive in community settings when there are highly structured but nonaversive behavior management programs and where there is close coordination among various service agency personnel, including integrated school programs where applicable (as in the Singer et al., 1984 study).

Hill, Lakin, and Bruininks (1984) conducted a nationwide survey of state-licensed and operated facilities and found both a decrease in the numbers of out-of-home placements for children, and an increase in the proportion of severely handicapped persons being served in the community. Sokol-Kessler, Conroy, Feinstein, Lemanowicz, and McGurrin (1983) contrasted behavioral data on matched groups of institutionalized and community-based residents, and found no developmental growth in the former group, but significant positive changes, including reductions in maladaptive behavior, in residents living in the community. This type of evidence coupled with improved attitudes, expectations, and skills, as well as a broader range of community service delivery models provides support for the prediction of increases in normalized living environments for integrated students approaching adulthood.

FUTURE DIRECTIONS

The overwhelming majority of research studies conducted over the past ten years provides clear support for integrated, less restrictive environments. By comparison, only a handful of studies and position papers have surfaced arguing against less restrictive placements (Cruickshank, 1977; Haywood, 1981; and Gottlieb, 1981; see also research reported by Biklen, 1979.)

Further research on the efficacy of integrated instruction, for all age groups, in comparison to segregated service models, is probably not needed. The case has been made. What is needed now is a body of research that relates best practice instructional procedures in specified integrated settings to reliable and socially valid outcomes. Questions requiring investigation include, for example, up to what ages should severely and profoundly disabled students have a mainstream regular class as their primary placement in order to maximize sustained horizontal interactions, leading to a more functional repertoire of age-appropriate skills? When and under what conditions should students begin to receive more community intensive instruction, with less concentration on peer-contact time in the school setting?

Related to these questions is the need for research on more effective, community-based teaching technologies. Sailor, Gee, et al. (1988) have argued that profoundly disabled students have been largely neglected in the recent advances in "best practices." Increased attention, for example, is needed on the development of microswitch systems and individualized adaptations that will facilitate the inclusion of this subgroup in the least restrictive environment. Concurrent investigations on the efficacy of heterogeneous groupings and the outcomes of these arrangements for both severely and profoundly disabled students should also be a focus of future research.

In addition, research is needed on nonaversive tactics with which to manage difficult behavior in community settings. Without this technology, recidivism and backlash are predictable concomitants to further integration efforts. Increased longitudinal and ethnographic investigations of integration's impact on students' quality of life outside of school, would also strengthen the existing data base and provide more information regarding the social validity of integrated "best practices."

Finally, the development of techniques to reduce prompt dependency and to facilitate the acquisition of generalized skills in natural settings offers a "new frontier" of research in applied teaching technology that is likely to sustain and enhance the movement toward the education of all students with disabilities in fully integrated and nonsheltered environments.

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Appendix O

Course Syllabi

California State University, Hayward
Department of Educational Psychology

EPSY 6977 Code 56540 **Inclusive Education for Students with Severe Disabilities (and Related Fieldwork)**	**Dr. Ann T. Halvorsen** **Monday 4:00 - 7:30 p.m.** **Winter 1992** **Room: AE 390** **(Office hrs. M 3-4)**

Prerequisite: EPSY 5021, 6136 or by permission of instructor.

A Purpose:

This course is designed to provide students pursuing the SH teaching credential and/ or Master of Science in Special Education with the skills and competencies required to function effectively in integrated, regular public school and community environments which are chronologically age-appropriate for their students, and which provide severely disabled (SD) students with opportunities to develop sustained relationships with their nondisabled (ND) peers across a variety of instructional and non-instructional general education settings. The primary emphasis will be on maximizing school integration. There will be major emphases on competencies teachers need to: A) Facilitate formal and informal "ability awareness" education to all school and community personnel, general education classmates and parents; B) fully integrate themselves within the school community; C) structure/ facilitate social support systems and interaction among students; D) function as a team member with general educators; E) analyze general education schedules and lesson plans for adaptation and inclusion.

B. Objectives:

1. Each student will demonstrate competence in presenting the definitions, philosophy, legal basis, rationale for and benefits of integrated instruction.

2. Each student will demonstrate knowledge of necessary components of inclusive education of students with severe disabilities across age levels and range of disability.

3. Each student will demonstrate knowledge of and facility with methods, media and materials designed to enhance acceptance and inclusion of severely disabled students into the general education community with their nondisabled peers.

4. Each student will demonstrate the ability to design, implement and evaluate ability awareness education and peer interaction programs.

5. Each student will demonstrate knowledge of general guidelines and procedures for scheduling and arranging for instruction within general education classrooms, including knowledge of innovative instructional practices e.g., cooperative learning, thematic instruction etc.

6. Each student will demonstrate knowledge of logistical issues and solutions to implement an integrated/inclusive program and will utilize these procedures.

7. Each student will be able to apply needs assessment and inventory strategies across school environments.

8 Each student will demonstrate positive communication and public relations skills with all school and community site personnel.

C. Course Requirements

1. Each student will work at an approved integrated or inclusive school site serving "SD" students for a minimum of 9 hours per week over the quarter, and will keep a practicum log delineating times, purpose and description of all fieldwork activities, as documentation of hours spent in fieldwork. (To be reviewed midterm by supervisor and to be handed in to Dr. Halvorsen at end of quarter). Fieldwork taken in conjunction with Dr. Anderson's strategies course (EPSY 6137) will be for a total of 12 hours per week.

2. In class mid-term exam which will stress translation of knowledge/ theory into practice. Alternative assessment strategies may be utilized at the midterm in lieu of an exam. (To be discussed in class).

* 3. School site needs assessment.

* 4. Environmental inventory packages including detailed analyses of at least three school environments.

* 5. Development, implementation and evaluation of two of the following three products/ units:

    a) ability awareness education program for general education students/ staff, as determined through site assessment and with master teacher's input/ approval.

    b) peer or friends/ buddies program or support network, including program design, student recruitment, and implementation according to the needs/ resources of the site, in coordination with master teacher.

    c) general ed curricular adaptation program: development and implementation with at least one student, in coordination with master teacher.

6. Related homework assignments and completion of all course readings as assigned. Due dates for each of the products listed under #5 appear in the attached syllabus. By these due dates implementation at the fieldwork site will have occurred, outcome or evaluation data will have been collected and all written materials will be handed in. Units and HW will be typed.

Required Readings:

A series of readings have been compiled and will be xeroxed at cost for each student.

(* Descriptions and formats to be distributed in class)

EPSY 6977: Dr Ann T Halvorsen - Winter 1993 R = to be reference only. Appears in 6136 or 6140

Date/ Session	**Topic**	**Reading/ Resources***	**Assignments** (no class 1/18)
			WEEK 1: Jan 11-Jan 25
Jan 11 Session 1	History, legal bases and rationale for integated inclusive education AV: Regular Lives (if time)	R1. Sailor et al. (1989). The Comprehensive local school. Ch. 1. pp. 1-26. Baltimore, MD: Paul Brookes. 2. Halvorsen, A. & Sailor, W. (1990) Integration of students. A Review of Research. In Gaylord-Ross (Ed.) Issues and Research in Special Ed. New York: TeachersCollege Press. 110-172 3. Stainback, S. Stainback, W. & Jackson, H.J. (1992). Toward inclusive classrooms. In Stainback & Stainback (Eds.) Curriculum Considerations. Baltimore: Brookes. 4. Karasoff, T. & Kelly, D. (1989) What makes integration work? STRATEGIES 1 (1). 1-2. SF: CRI * 5. CA State LRE Policy (1986) * 6. S.F.U.S.D. Policy. 7. Neary, Halvorsen et. & Smithey (1992) Inclusive education guidelines PEERS PROJECT 8. New Mexico Vision Statement on Full Inclusion (1992)	1. Coordinate fiedwork schedule with CSUH supervisor and master teacher. 2. Begin fieldwork log. 3. Discuss site needs assessment and schedule interviews process with master teacher and principal (HW#1) 4. Give copies of course syllabus description, etc. to master teacher. 5. Conduct interviews and write up results. **(DUE Jan 25)**
Jan 18	Martin Luther King Day (NO CLASS)		

Date/ Session	Topic	Readings/ Resources *	Assignments
			WEEK 2: Jan 25-Feb 1
Jan 25 Session 2	Components and Outcomes of Integrated Models AV: Principals Tape (CRI) or A New Way of Thinking (Minnesota)	R1. Brown, Long et al. (1989). The home school: Why students... must attend and be in schools of their brothers, sisters, etc. JASH 14 (1), 1-12. 2. Williams, et al. (1989). Is regular class placement really the issue? JASH, 14 (1), 1-12 3. Stainback, Stainback & Bunch (1989). A rationale for the merger of regular and special education. In Stainback, Stainback & Forest, Educating all students. Baltimore, MD: Paul H. Brookes, pp. 15-26. 4. Hanline, M.F. & Halvorsen, A.T. (1989). Parent perceptions of the integration transition process. Exceptional Children, April * 5. Reid, R. Homecoming, Burlington, VT: Univ. of Vermont. * 6. Thousand, J. (1987). Best educational practices. Burlington, VT: University of Vermont, The Decision Maker.	1. Interviews for site needs assessments. (principal or designee, and teacher). **(DUE: today, Jan 25** 2. Begin site needs assessment **(DUE: Feb 8)** 3. Select unit area topics with master teacher input.

Date/ Session	**Topic**	**Readings/ Resources**	**Assignments**
			WEEK 3: Feb 1-Feb 8
Feb 1 Session 3 Interviews Due	Site Needs Assessment and Environmental Inventories	R1. Sailor, Anderson, Halvorsen, Filler & Goetz (1989). Ch. 3: Integrated Educational Services. In The comprehensive local school. Baltimore, MD: Paul Brookes, pp. 57-102. *2. Halvorsen, A. (1990 Rev. Ed.) On-site review of integration. PEERS; Halvorsen Smithey & Neary (1991 rev. ed) Implementation Site Criteria for Inclusive Programs. PEERS Project. *3. Guernsey, E. (1990). Information about the regular school. Santa Clara COE. 4. Neary et. al. (1992) School site inventory. TRCCI. (CA. Dep't of Education).	1. Continue site needs assessment **(DUE: Feb 8) HW*2** 2. Begin unit development based on needs assessment data.
			WEEK 4: Feb 8-Feb 15
Feb 8 Session 4 & Feb 15 Session 5	Site Preparation and Facilitating Positive Attitudes AV: CRI Ability Awareness Tape	1. Murray & Porter Beckstead (1983). Understanding the nature of attitudes. In AIM, pp. 7-14. 2. Murray & Porter Beckstead (1983). a) Trainer of Trainers Model of Inservice. AIM, pp. 25-33. Inservice lesson plans, pp. 34-38. *b) Learning stations modules revised ed. c) Developing your own AV materials, pp. 83-87. 3. Graham, N. (1987). Students with significant challenges: Choosing and developing integrated activities. San Francisco, CA: SFSU, CIPSSI Project	1. **Needs assessment DUE TODAY (Feb 8)** 2. Conduct school site inventories for ecological inventory assignment. **(DUE: Feb 22)** 3. Continue unit development.

Date/ Session	**Topic**	**Readings/ Resources**	**Assignments**
		*4. Halvorsen (1990) Ability Awareness. Hayward, CA: PEERS PROJECT. 5. Biklen, D. (1989) Making difference ordinary. In Stainback et al. (Eds.) Educating all students in the mainstream. Baltimore, MD: Paul Brookes, pp. 235-248. 7. Schnorr, R. (1991) Peter? He comes and goes. JASH, 15 (4), 231-240.	**WEEK 5: Feb 15-Feb 22** 1. Continue school site inventory assignment **(DUE: Feb 22) HW#3** 2. Continue unit development 3. Prepare for midterm **MIDTERM: Feb 22**
Feb 22 Session 6	MIDTERM (1st half of class) Facilitating and Structuring Social Support, Interaction and Friendships AV: Circle of Friends (Forest)	All readings through Session 5 will be included in midterm evaluation/ assessment in class. 1. Gartner, A., & Lipsky, D.K. (1990) Students as instructional agents. In Stainback & Stainback (Eds.) Support Networks. Baltimore: Paul Brookes. pp. 89-93. 2. Meyer, McQuarter & Kishi (1985). Assessing and teaching social interaction skills. In Stainback & Stainback Integration of studetns with severe handicaps. pp. 66-86. 3. Gaylord-Ross & Pitts-Conway (1984) Social behavior development in integrated secondary programs. In Certo Haring & York Public School Integration. pp. 197-218.	**WEEK 6: Feb 22-Mar 1** 1. Inventories **(DUE: today, Feb 22) HW#3** 2. Curricula Adaptation. **(DUE: Mar 8) HW#4** 3. Unit implementation.

Date/ Session	Topic	Readings/ Resources	Assignments
Feb 22 Session 6 cont.		4. Peck, C., Donaldson, J. & Pezzoli, M. Heming (1990) Some benefits non-handicapped adolescents perceive . . . JASH 15, (4), 241-249. 5. Stainback, W. & Stainback, S. (1990) Facilitating peer support and friendships. In Stainback & Stainback (Eds.) pp. 51-64. 6. Villa, R. & Thousand, J.S. (1992) Student Collaboration: An essential for curriculum delivery in the 21st century. In S. Stainback & W. Stainback (Eds.) Curriculum consideration in inclusive classrooms, (pp117-142). Baltimore: Brookes.	
			WEEK 7: Mar 1 - Mar 8
Mar 1 Session 7	Social Interaction and Friendship (continued) AV: Slides	1. Strully, J. & Strully, C. (1989). Friendships as an educational goal. In Stainback, Stainback & Forest (Eds.) Educating all students in the mainstream. Baltimore, MD: Paul Brookes, pp. 59-68. 2. Forest, M. Lusthaus, E. (1990). Everyone belongs. Teaching exceptional children. Winter. 3. Vandercook, T., York, J. & Forest, M. (1989). The McGill Action Planning System: A strategy for building the vision. JASH, 14 (3), 205-215.	1. **Curricular Adaptation (DUE: Mar 8)** 2. Continue unit development and implementation.

Date/ Session	**Topic**	**Readings/ Resources**	**Assigaments**
Mar 1 Session 7 cont		R4. Johnson, D.W. & Johnson, R.T. (1989). Cooperative learning and mainstreaming. In Gaylord-Ross (Ed.) Integration strategies. Baltimore, MD: Paul Brookes. pp. 233-248. 5. Ferguson, D., & JeanChild, L.A. (1992). It's not a matter of method. In Stainback & Stainback (Eds.) Curriculum Considerations. pp.159-174.	
			WEEK 8: March 8-March 15
March 8 Session 8	Curricular Adaptation to Support Inclusion AV. Davis tape. (PEERS-CRI) Slides (PEERS)	1. York, J. & Vandercook, T. (1989). Designing an integrated education for learners with severe disabilities through the IEP process. Teaching Exceptional Children. *2. Giangreco, M. Cloninger, C. & Iverson, G. (1989). C.O.A.C.H. Version #5. Burlington, VT: University of Vermont. 3. Ford, A., Davern, L. & Schnorr, R. (1992). Inclusive education: Making sense of the curriculum. In Stainback & Stainback (Eds.) Curriculum considerations. pp37-64	1. Curricular adaptation assignment **(DUE: today Mar8)** 2. Unit and evaluation implementation. **Products due in class March 15** 3. Fieldwork performance evaluation with supervisor and master teacher

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Date/ Session	**Topic**	**Readings/ Resources**	**Assignments**
Mar 8 Session 8 cont.		4. Thousand, J. S. & Villa, R. (1990). Sharing expertise and responsibilities through teaching teams. In Stainback & Stainback (Eds.) Support systems for educating all studetns in the mainstream. Baltimore, MD: Paul Brookes. R5. Baumgart et al (1982). Principle of partial participation and individualized adaptations. JASH, 7, 17-27 (will appear in 6140/6142 readers). 6. Ford, a. & Davern, L. (1989). Moving forward with school integration: Strategies for involving students in the life of the school. In Gaylord-Ross (Ed.) Integration Strategies. Baltimore, MD: Paul Brookes. *7. Neary, T. & Halvorsen, A. (1992). Curricular adaptation materials.	
			WEEK 8: March 8-15
March 15 Session 9	Putting it all together for maximal integration Typed Units Due	1. Sailor, W. (1992) Special education in the restructured school. Remedial and special education, 12(6) 8-22. 2. Sailor, W., Gee, K. & Karasoff, T. (in press) School restructuring and full inclusion. To appear in M. Snell (Ed) Systematic Instructuring. . . (4th ed.) Columbus, OH: Merrill Publishing Co.	1. Oral presentations 2. Finalize unit takeover by classroom staff 3. Fieldwork log 4. **Typed units due today Mar 15.**

California State University, Sacramento
School of Education

EDS 100 Education of Exceptional Children
Spring 1993

Instructor: Tom Neary Office: 641-5930 Home: 451-4840

Material:
1. Heward, W. & Orlansky, M. (1992). Exceptional Children. (4th Ed.) Merril/MacMillan Publishing Co. (Required)

2. Neary, T.; Halvorsen, A.; Kronberg, R. and Kelly, D. Curriculum Adaptations for Inclusive Classrooms. CRI1992. (Required)

Course Objectives:
Students will:
a. identify characteristics of exceptional pupils in terms of developmental and service needs.
b. recognize differences and similarities in labeled and non-labeled students.
c. modify core curriculum to adapt to student needs.
d. promote pupil growth in interpersonal relationships.
e. communicate appropriate information in a positive manner to other professionals and families.
f. understand current legislation dealing with special education, including least restrictive environment and due process for parents and educators.
g. identify strategies for facilitating positive interactions between students.
h. recognize the perspective of families in providing educational services to students with special needs.
i. develop one ability awareness lesson.
j. describe the perceptions of special education teachers and students about special education.
k. describe strategies for identifying the meaning of undesirable behavior.

Tests/ assignments:

Midterm:	100 points; due March 2 Text: chapters 1-6, 13; and Supplemental readings. Take home.
Final exam:	100 points; due May 18 Text: chapters7-12; and Supplemental readings. Take home.

Teacher interviews: (50 points)
Conduct interviews with two special education teachers at a regular school site. One interview must be with a Resource Specialist Teacher and one with a Special Day Class Teacher or Integration Specialist (Full Inclusion model). Responses of both educators are to be typed separately and followed with a comparison of the views of both. Interviews must follow the format described below.

Student interviews: (50 points)
Conduct two interviews with students in special education following the format and questions shown below. Interviews may be for students in an elementary or secondary program. One interview should be with a student in a resource program and the other with a student in a special day class. Responses of both students are to be typed separately and should be followed by a comparison of the two students' views.

Ability awareness lesson: (30 points)
Develop one simulation exercise designed to promote understanding of specific disabilities by students. Note the age level of the students targeted, the disabling condition(s), objectives of the lesson, materials needed and provide a script.

Adapted lesson: (40 points)
Describe how a student with severe disabilities in cognitive and motor functioning will participate in a chronologically age-appropriate core curriculum activity at either the elementary or secondary level. Provide a brief (and respectful) description fo the student and identify:

a. the objectives of the activity for all students.
b. specific IEP objectives in the activity for the identified student.
c. strategies for adapting materials, providing physical assistance, changing rules, changing the level of participation.
d. specific teaching strategies.

Attendance: (30 points).
Classroom attendance is required. Points may be deleted for arriving late or leaving early.

Observation: (0 points)
As part of this course, you are required to observe students with disabilities. CSUS expects 30hours of observation. Prior experience in programs for students with disabilities may be considered. You will be required to provide a letter of completion by May 18, 1993.

Summary of assignments

Assignment	Points	Due date
midterm exam	100	March 9
Teacher interviews	50	March 23
Student interviews	50	March 30
Ability awareness lesson	30	April 13
Adapted lesson	40	April 20
Final exam	100	May 18
Attendance	30	May 18
Observation	0	May 18
Total points possible	400	

Grading:

Point total	%	Letter grade
376-400	94%	A
364-375	91%	A-
348-363	87%	B+
332-347	83%	B
320-331	80%	B-
308-319	77%	C+
292-307	73%	C
280-291	70%	C-
240-279	60%	D
-239		F

Tentative Schedule

2/2/93	Overview to course; topics and requirements; history of services. Readings: Text chapters 1&2.
2/9/93	Legislation; legal challenges; initiatives in education. Readings: Text chapters 3&4. Video: Regular Lives.
2/16/93	Parent and consumer perspectives on education. Readings: Text chapters 4&5. Guest speakers.
2/23/93	Learning Disabilities Readings: Text chapter 6 &7.
3/2/93	Behavioral problems Midterm exam provided.
3/9/93	Communication problems. Midterm due. Readings: Text chapter 8. Video: Facilitated Communication. Possible guest speakers.
3/16/93	Hearing and Vision impairment. Readings: Text chapters 9 &10. Guest speaker.
3/23/93	Physical and health impairments; Severe disabilities. Debrief teacher interviews Readings: Text chapters 12 & 13.
3/30/93	Adapting core curriculum for students with severe disabilities. Debrief student interviews. Readings: Curriculum Adaptations...pp.1-37. Guest speakers.
4/13/93	Student planning strategies: MAPS; Transition planning. Video: With a Little Help From My Friends. Readings: Curriculum Adaptations...pp. 38-126. Final exam provided.
4/20/93	Cultural diversity in special education. Discussion of observations. Turn in any completed assignments, final exam.
5/18/93	All assignments, observation letter, final exam due.

Fieldwork requirements

1. Complete a minimum of 30 hours of observation of students with exceptional needs in an instructional setting.
2. At least 20 of those hours must be in an instructional setting for 3-22 year old students formally enrolled in special education.
3. Meeting the aboue criteria must have occurred in the last 7 years.
4. Observations may occur in more than one setting.
5. ED TE 103.0, *Tutoring Children* is acceptable for the required observation hours *if the tutored student is formally enrolled in special education.*
6. Examples of acceptable instructional settings include:
    a. public/private school programs with integrated students. (30 hours)
    b. public/private school programs with integrated gifted students. (10 hours)
    c. special education programs. (30 hours)
    d. GATE (Gifted And Talented Education) programs. (10hours)
    e. Continuation high school, Bilingual/ESL and Chapter 1 programs with integrated students. (30 hours)
    f. Special Olympics coaching.
    g. Parenting an individual who is in a special education program. (10 hours)
    h. Pre-school (birth to 3 years) special education. (10 hours)
    i. Adult (post 22 years) special education. (10 hours)

Placement contacts:

It is the student's responsibility to arrange their own observations. Special education offices are listed below, however students may arrange with other districts/county offices.

a.	Elk Grove USD	686-7780	
b.	Sacramento City USD	454-6745	(SCUSD will allow students to directly contact principals or teachers to arrange the observation).
c.	San Juan USD	971-7525	
d.	Sacramento County Office	421-8495	South County
		991-6765	North County
		366-2259	Central County
e.	Folsom Cordova USD	985-9913	

Special Educator Interviews (40 Points)

Interviewer(s) ____________________

I. **RSP Interviewee (10 points)**

   a. Interviewee (optional) __________

   b. Job Title/Level __________

   c. School/Address __________

   d. Synopsis of Interview Questions (items 1-18 of *Addendum*)

II. **SDC/LH Interviewee (10 points)**

   a. Interviewee (optional) __________

   b. Job Title/Level __________

   c. School/Address __________

   d. Synopsis of Interview Questions (items 1-18 of *Addendum*)

III. **Comparison of Above Interviews (Narrative) (9 points)**

IV. **Personal Conclusion(s)/Reaction(s) to Findings (Narrative) (9 points)**

V. **Sample Blank IEP Attached (2 points)**

NOTE: This exercise is graded according to the following:

a. Typed
b. Neatness/Professional Execution (typos, grammar, misspellings, etc.)
c. Two Interviews Conducted (1 RSP & 1 SDC)
d. Comparison Summary
e. Conclusion/Reaction Summary
f. IEP Attached
g. Adherence to Format (headings, etc.)

ADDENDUM to INTERVIEWS (INSTRUCTORS)

Interview Questions:

i. Length of time at current site?
ii. Length of time a teacher?
iii. Other grades/programs/courses taught?
iv. Number of students in program?
v. What is the ratio of male to female students in program?
viA. Number of students enrolled in (count duplication allowed):
   a. English/Reading — b. Remedial Reading
   A c. Mathematics — d. Remedial Mathematics
   e. Foreign Language — f. Science
   g. Home Economics — h. Industrial Arts
   OR i. Business Education — j. Social Studies/Sciences
   k. Physical Education — l. Adaptive P.E.
   m. Music (instrumental/vocal) — n. Drama
   B o. ROP/Work-Study — p. Sports
   q. Clubs — r. Student Government
   s. Other Courses (identify) — t. Other Extra-Curricular School Functions (identify)
viB. Number of Elementary Students Integrated into Regular Classes and Type of Subjects?
vii. Do other site teaching faculty attend IEP meetings?
   a. Please identify b. Why/Why Not?
viii. Do Administrators attend IEP meetings?
   a. Please identify b. Why/Why Not?
ix. Who typically attends an IEP meeting?
   a. Please identify
   b. Who should be attending?
x. Length of time for an average IEP meeting?
   a. Initial b. Review? c. Final?
xi. Are regularly scheduled meetings occurring between site faculty and special educators?
xii. Number of times consultation with other site faculty occurs (daily, weekly, etc.)?
xiii. Has your site implemented "Student Study Teams?"
   a. If yes, are you a participating member?
   b. How often do you meet?
xiv. "Mainstreaming" concept functioning successfully at your site?
   a. Reasons for successes?
   b. Reasons for failures?
   c. What could be done at your site to achieve "mainstreaming" success?
xv. How are your students graded?
   a. Other Classes? b. Your class?
xvi. What major modifications, adaptations are made by general educators to meet the special needs of your students?
xvii. What major modifications, adaptations would you like to see general educators make to meet the special needs of your students?
xviii. Other? General Comments?

Special Education Student Interviews (30 Points)

Interviewer(s) ______________________________

I. **RSP Student Interviewee (10 points)**

  a. School ______________________________

  b. Grade Level ______________________________

  c. Synopsis of Interview Questions (items 1-20 of *Addendum*)

II. **SDC/LH Student Interviewee (10 points)**

  a. School ______________________________

  b. Grade Level ______________________________

  c. Synopsis of Interview Questions (items 1-20 of *Addendum*)

III. **Comparison of Above Interviews (Narrative) (5 points)**

IV. **Personal Conclusion(s)/Reaction(s) to Findings (Narrative) (5 points)**

V. **Sample Blank IEP Attached**

NOTE: This exercise is graded according to the following:

a. Typed
b. Neatness/Professional Execution (typos, grammar, misspellings, etc.)
c. Two Interviews Conducted (1 RSP & 1 SDC)
d. Comparison Summary
e. Conclusion/Reaction Summary
f. IEP Attached
g. Adherence to Format (headings, etc.)

ADDENDUM to INTERVIEWS (STUDENTS)

Interview Questions: ***(Note:* You may need to paraphrase some of these questions.)**

i. Grade (freshman, sophomore, junior, senior, other)?
ii. RSP or SDC classroom? Why placed there?
iii. Male or female?
iv. Years enrolled in Special Education?
v. Types of classes/services received in special education?
vi. General education courses currently enrolled in?
vii. Best subjects (and why)?
viii. Worst subjects (and why)?
ix. Extra-curricular school activities (identify)?
x. Outside--school hobbies/interests (identify)?
xi. Attitude of special and general education teachers (and why perceived)? How treated?
xii. Attitude of special and general education students (and why perceived)? How treated?
xiii. What modifications/adaptations have been made to meet your unique learning needs in:
  a. general education classes?
  b. special education classes?
xiv. What *could* be done to help meet your unique learning needs in:
  a. general education classes?
  b. special education classes?
xv. What do you wish your parents knew or told you about your special needs?
xvi. Intend to graduate from high school?
xvii. Intend to continue on at a community college, university, etc. (identify)?
xviii. General opinion of personal education history (past, present--worthwhile, etc.)?
xix. What should all general educators be aware of when working with a special needs student?
xx. Other?

DRAFT

A SUMMARY OF THE RESEARCH:

THE ELEMENTARY SCHOOL PRINCIPAL'S ROLE IN THE EDUCATION OF STUDENTS WITH SEVERE DISABILITIES

by
Gwen Smith

Historical Information

Education is, and always has been, a changing and evolving service. There are many different ideas and theories concerning the best practices in reference to the education of children. The underlying factor in all of these theories is that educators and researchers are promoting change within the feild to create the best possible education system for all students. Two of the current and most effective models of educating students with severe disabilities are the inclusive and self-contained classroom~~s~~ education models.

These models have developed over time in a natural progression. Historically the education of students with severe disabilities has evolved from very separate to integrated models of service delivery. Students with severe disabilities were once segregated from our mainstream schools and housed in large institutions, (Brown et al 1979). This practice represents a premise that people with disabilities need to be protected and that their needs will best be met in an isolated, segregated enviornment. (Sailor et al, 1989)

The education of students with severe disabilities then progressed to the implementation of programs in specialized centers and classes. People with disabilities were now living in their communities but their lives were kept very segregated from the nondiabled community. (Mercer and Denti, 1989). Parents, educators, advocates and legislators began to realize that students with disabilities could best be served in their home communities and their neighborhood/community schools. (Brown et al, 1979)

The passing of Public Law 94-142, the Education of the Handicapped Act, in 1975 became a very important factor in state educational delivery methods. Across the country very costly special education service systems were created to follow the law. This caused the emergence of a separate yet par~~r~~allel education system. (Sailor et al, 1989).

Students with severe disabilities were now being mainstreamed and integrated into regular schools into nonacademic activities with their nondisabled peers. (Schattman & Benay, 1992). In California some studnets with severe disabilities were, and are, being placed in self-contained special education classes on a regular school campus, and they are integrated with their nondisabled peers for various activities throughout the day. (Wilson, 1989). The educational curriculum for these students is based on the Community Intensive Instruction model. (Sailor et al, 1989). In this model programs for students with severe disablilities are delivered in a ~~separate~~ classroom on a regualr school campus with skills being taught at school and in the community. The students' individualized programs are decided upon by a team consisting of, the students' parents, a special education teacher, designated instructional services staff (ie:speech therapist), a school administrator or designee, and anyone else relevant to the education of the student. (Neary et al, 1991).

In the 1980's a new theory began to be discussed in the feild of special education. This theory took the self-contained program model one step further. Instead of integrating students with disabilities for only nonacademic subjects, this theory proposed including students in the regular education classroom 100% of the day with their nondisabled peers. (Schattman & Benay, 1992). This model is referred to as full inclusion or the inclusive classrooms model.

It seems after many years of segregating students with severe disabilities and providing for these students under a completely different system. School districts all over the country are realizing that when they say "all students", they must include those with differences. (Conn, 1992). It is through intrinsic examination of district educational philosophies that changes are beginning to take place. School districts all across Canada and the United states are "inviting back" students with severe disabilities, to the neighborhood schools they would have attended had they not been born with a disability. (Conn, 1992; Cloud, 1992; Schattman & Benay, 1992).

Inclusive classrooms in practice are defined as programs in which students with severe disabilities are primary members of their age appropriate general education classrooms in their home schools, wiht support from special education teachers and designated services staff as deemed necessary by the students´ individualized education team, which consists of the students parents, teachers, both regular and special education, designated instructional services staff, principlas and any other person necessary to deliver the best program possible for each students. (Sailor, 1991).

The task of educating students of any ability belongs to teachers and ultimately to the school administrator. To effectively implement any model or strategy, there is a need for strong and innovative management. In elementary schools this role is undertaken by the principal. The principal´s leadership style and involvement sets the stage for effective and quality programs in both special and general education. LeSourd and Grady (1988) discuss the idea that school effectiveness is a direct result of principal leadership. Researchers are calling for principals to become instructional leaders, or leaders that are more involved in the actual instruction and decision making regarding the students in their schools.(Heck et al, 1990; LeSourd & Grady, 1988; Stronge, 1988)

In the self-contained classrooms model where the needs of students with severe disabilities are undertaken generally by special education teachers and administrators, the principal of the school often plays a less invoved role. (Servatius et al, 1991). As inclusive programs are becoming more and more popular, the role of the principal must be more involved. It is imperative for the principal to become involved because the inclusive classroom creates a change for the entire school. (Wilcox et al, 1991). The separatness created by the special education system is breaking down and researchers and educators alike are stressing the fact that schools are for all kids. Principals must realise that students with special needs are students at their schools, no matter what model or program they are involved in. (Schattman & Benay, 1992; Hornbeck, 1992; Conn,1992; Cloud, 1992; Wolak et al, 1992; Ayres & Meyer, 1992; Servatius et al, 1991; Wilcox et al, 1991).

Due to the changes in special education service delivery over the years it has been impossible that the degree of ownership or involvement of the regular school principal would not increase. Educators today are debating over the philosophy and practice of full inclusion as a best practice in the education of students with special needs. The right of students with disabilities to be educated with their nondisabled peers in their neighborhood school is evident in all of the literature and in the hearts of parents and educators all across the country. Change is always a fearful and difficult step for professionals in any field of endevour. Education is no different. Strong and informed leadership will be one of the key issues in the effectiveness of programs for students with severe disabilities. One such leader, Principal Dennis Martin eloquently summarized "...the most important things to me are to recognize that people are people, and that all people can learn and need to experience self-worth and dignity. We all need heop from others to realize our potential. We all need to understand that all of us have exceptionalities to overcome or to learn to live with to make us better people" (Wilcox et al, 1991 p. 4).

Hypothesis

As the education of students with severe disablities evolves, the role of the principal is important whether that program is a self-contained classroom model or an inclusive classroom model. To determine the effectiveness of programs and the degree to which the elementary school principals show involvement in the education of students with severe disabilities, a questionnaire was developed to examine the degree of ownership a school principal demonstrates towards the different teachers and programs in the school, comparing principals in schools where students are in self-contained classrooms and in inclusive programs. The question naturally created is: do elementary school principals demonstrate greater ownership of programs for students with severe disablities, when those students are fully included in age and grade-appropriate general education classrooms in their home schools/schools of choice in contrast to programs for students with severe disablities following the self-contained classrooms model?

Methodologies

The principal survey was conducted using a questionnaire developed by this researcher in collabration with Michele Roley, graduate student, and Dr Ann Halvorsen. There are a total of sixty-five questions asked in the survey. These questions are divided into four areas, these are: A) Principal's Role as a Supervisor B) Parent Involvement C) Behavior Management D)Contractual Issues. There was an answer choice of yes/no/or sometimes. Some of the principals added a few comments regarding specific questions and these were noted by the researcher. The covering page of the survey consists of some personal information regarding years as a principal, training, specific training in special education, and any other training or specialized areas.

The principals who were used as subjects for this research were the principals at schools chosen by the California Research Institute as schools where model programs exsisted. The schools and special education staff were participating in a study being conducted by CRI to compare the quality of programs by studying the completion of individualized education plan goals and objectives. There were 14 principals included in this study. They were from schools across the state of California. Seven of the schools followed the inclusive education model and seven followed the self-contained classroom model. Eleven were PEERS project sites

The survey was conducted as a telephone interview. The principals were notified by letter, by Ann~~e~~ Halvorsen of PEERS, introducing this researcher and thanking them for agreeing to participate in the study. The letter was followed by a brief telephone introduction to set up the interview time and date. The survey was sent to them for their perusal at least tow days prior to the scheduled interview time. The actual survey interview lasted from ten to thirty minutes. After the interview all data ~~was~~ were coded and the principals were referred to only by their code numbers to ensure their anonymity.

The questions asked were directed towards the principal's expectations of general education teachers, teachers of students with severe disabilities and designated instructional services staff. Each question was asked regarding each different staff person. This was done in an attempt to establish principal expectations of general educators and compare that to the expectations the principal has concerning teachers of students with severe disabilities. Designated instructional services staff were included to provide for schools where teachers of students with severe disabilities work on an itinerant schedule and may be grouped with designated instructional services staff because they are not at the school site on a full time basis.

The data were tabulated and mean scores were found. Answers were weighted with numerical values, a yes scored 3, a sometimes scored 2, and a no answer scored 1. The four areas of questions were divided into answers concerning general education teachers, teachers of students with severe disabilities, and designated services staff. The mean scores were tabulated to show the results regarding each educator in each different area. The means were also tabulated for the entire group score.

Data

The data collected through the principal interview survey depicts the degree to which principals demonstrate ownership of programs for students with severe idsabilities in their schools. In comparing the degree of ownership between fully inclusive programs and self contained classroom programs this survey suggests a greater degree of ownership in fully inclusive programs. The mean scores of the participants, where yes was the most valuable answer(that answer which showed the highest degree of ownership) and possessed a numerical value of 3, shows fully inclusive programs with a slightly higher mean score.

Overall score of all participants:

	Total score	Mean Score	Mean score per answer
Perfect	1365	195	3
Full Inc.	1249	178.4	2.745
Self-Con.	1247	178.1	2.740

Scores for questions asked concerning different groups of concern

	Total score	Mean score	Mean score per answer
Gen. Ed	FI-389	FI-55.571	FI-2.924
	SC-384	SC-54.857	SC-2.887

Special Ed.	FI-421 SC-406	FI-60.142 SC-58	FI-2.733 SC-2.636
DIS	FI-400 SC-410	FI-57.1 SC-58.5	FI-2.59 SC-2.66

The data shown above depict~~s~~ the difference in the mean scores. Although slight, the scores show the ~~data is~~ results are always higher for fully inclusive(FI) programs than for self-contained programs. Dividing the results into the three different areas of concern that the questions were based on, the data show~~s~~ that the principals surveyed expressed a slightly greater degree of ownership of questions asked concerning general education teachers and students than when the questions were asked concerning students with severe disabilities and their teachers. The results of the survey also show that principals demonstrate less ownership of the designated services staff(DIS) that serve their school.

In analysing the data further there were interesting scores in the Behavior Management section of the survey. The mean scores for specific questions are listed below. A score of 3, shows a yes answer and is interpreted as depicting a high degree of ownership towards the group ~~s~~cited in the question.

Question #1-Behavior Management Are you involved with daily behavioral issues of students with severe disabilities?

Mean Scores- FI=2.571 SC=2.142

Question #3-Behavior Management Are you involved with daily behavioral issues of general education students?

Mean Scores- FI= 2.857 SC=2.714

Question #9-Behavior Management Are you involved with the development and implementation of behavior management programs for students with severe disablities?

Mean Scores- FI= 2.857 SC= 2.142

Question #6-Behavior Management Are you involved with the development and implementation of behavior management programs for general education students?

Mean Scores-FI= 2.714 SC= 2.714

Question #5-Behavior Management Are students with severe disabilities expected to follow the same posted school rules as general education students?

Mean Scores- FI=2.857 SC=2.428

Question #8-Behavior Management Are there posted school rules which general education students are expected to follow?

Mean Scores- FI=3.0 SC=2.714

These scores express a definite difference in the degree of ownership the principals of this survey depicted. In all of the questions asked concerning students with severe disablities the principals from schools with fully inclusive programs always answered higher than principals at schools where students were in self-contained programs. When the same question was asked concerning general education students the scores depict the same answer or a very slight difference

The trend of the data suggests that principals are more involved with students who have severe disablities when those students are in fully inclusive programs. ~~That is not to say~~ that students with severe disablities require more involvement, but that they deserve the same degree of involvement as those students without disablities.

This is interpretation [illegible]

Summary

In returning to the hypothesis proposed, do elementary school principals demonstrate greater ownership of programs for students with severe disablities, when those students are fully included in age and grade-appropriate general education classrooms in their home schools/schools of choice in contrast to programs for students with severe disablities following self-contained classroom models? The ~~data~~ results ~~collected~~ from this survey ~~is~~ are statistically insignificant. ~~Although~~ If the data ~~is~~ are reviewed for the trend and direction, ~~to which it flows~~, it is obvious that the principals in fully inclusvie programs are more involved in the education of students with severe disablities.

Therefore, although the results are slight the implications for further study are obvious. There is a need for this research to reach principals so they can understand how ~~they involve themselves~~ their involvement in the education of students with severe disablities can make~~s~~ a difference. As leaders, the principal's involvement in any program is vital. The emergence of full inclusion as a best practice strategy in

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the education of students with severe disablities will change the entire structure of our education system. As the leader of a school site the principal will be a vital component of this change process. Special educators and the special education system must involve the principals of schools more in the decision-making and implementation of programs for students with severe disablities. The principal must realise that students with severe disablities are in need of her input and leadership as much as those students without disablities. This is becoming a reality because of inclusive education. Principals are ~~depicting~~ demonstrating more involvement and realising that all students have the right to be educated in their home schools with their age and grade appropriate peers in the general education classroom.

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Appendix P

Smith, G. (1993)

Principal's Ownership Study